



Australian Government

BSBCUE203 Conduct customer engagement

Release: 1

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Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 1.0.

Application

This unit describes the skills and knowledge required to respond effectively to customer engagement while complying with requirements and using a variety of communication methods.

It applies to individuals who perform a range of mainly routine tasks, using limited practical skills and fundamental operational knowledge and who work under some supervision and guidance.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Stakeholder Relations – Customer Engagement

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
<i>Elements describe the essential outcomes.</i>	<i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>
1 Prepare for customer engagement	1.1 Obtain and study product or service details relating to customer engagement 1.2 Study prepared engagement guides or scripts 1.3 Locate sources of information that may be required to develop product and service expertise 1.4 Develop an understanding of enterprise policies and procedures and personal targets or key performance indicators (KPIs) 1.5 Develop proficiency with equipment and systems to effectively and efficiently manage engagement

ELEMENT	PERFORMANCE CRITERIA
	1.6 Clarify details as required with relevant personnel
2 Provide quality service in response to customer queries	2.1 Use technology to respond to customer queries 2.2 Greet customer according to enterprise protocol and encompass cultural diversity 2.3 Establish and clarify customer needs 2.4 Satisfy customer needs promptly, efficiently and effectively to maximise customer satisfaction and minimise delays and need to refer customer elsewhere 2.5 Respond to customer concerns in a positive manner and in line with enterprise policy for complaint resolution 2.6 Treat customer with respect and courtesy, and enhance and develop customer loyalty 2.7 Complete follow-up action according to engagement escalation policy, timeframes, business rules and practices, and in line with customer expectations
3 Arrange provision of product or service	3.1 Respond appropriately to customer requirements and identify relevant options 3.2 Select appropriate product or service in consultation with customer 3.3 Agree actions or orders with customer giving consideration to maximising value and service delivery to customer 3.4 Consider customer retention options that can be applied to engagement 3.5 Use clear, simple and easy to understand language and ensure responses are comprehensive
4 Respond to customer enquiries	4.1 Adapt to the requirements and expectations of various customers when working in an outsource environment and dealing with multiple customer bases 4.2 Escalate enquiries or orders that cannot be satisfied immediately 4.3 Supply follow-up information to customer as required and in a timely manner 4.4 Observe organisational regulations and standards throughout transaction 4.5 Record details of engagement according to policy 4.6 Record and report difficulties not escalated but that may present an opportunity for continuous improvement

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

Skill	Performance Criteria	Description
Reading	1.1-1.4, 3.1, 4.4	Identifies and evaluates a range of texts to determine product information, performance standards and guidelines, and business requirements
Writing	3.5, 4.2-4.6	Prepares clear and specific information which conveys an understanding of service requirements, outcomes and alternatives for customers and workplace personnel
Oral Communication	1.6, 2.2-2.6, 3.1, 3.2, 3.4, 3.5, 4.3	Articulates clearly, using industry-specific language suitable to audience to convey requirements and listening and questioning techniques to confirm understanding
Navigate the world of work	1.4, 2.5, 2.7, 4.2, 4.4	Recognises organisational expectations and follows explicit protocols and procedures, regulations and standards in performance of job role
Interact with others	2.2, 2.3, 2.5, 2.6, 3.3, 4.1, 4.3	- Follows accepted communication practices and protocols in the provision of customer service. - Adjusts communication style in response to differences in customer profile, expectations and requirements
Get the work done	1.1-1.6, 2.1, 2.4, 2.7, 3.1, 3.2, 3.4, 4.3, 4.6	- Plans and implements routine customer service tasks and related workload, making limited decisions on sequencing and timing with support as required from relevant personnel - Analyses task requirements to decide on appropriate customer service options - Identifies difficulties that might present continuous improvement opportunities - Understands purposes, specific functions and key features of common digital systems and tools and operates them effectively to manage customer communication

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBCUE203 Conduct customer engagement	BSBCCO203A Conduct customer engagement	Updated to meet Standards for Training Packages Name changed to reflect industry practice	Equivalent unit

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBCUE203 Conduct customer engagement

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Performance Evidence

Evidence of the ability to:

- provide customer services to organisation's standards and guidelines
- use communication equipment and systems efficiently and effectively
- adapt communication techniques to suit customer profile and requirements.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- describe operational environment – customer base, company products and services
- describe organisational performance standards and customer service expectations
- identify organisational policies, procedures, protocols and communication channels
- outline principles of customer service
- outline operation of equipment and systems.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the stakeholder relations – customer engagement field of work and include access to:

- information technology and telecommunications equipment
- workplace information and data
- performance management records and data and quality assurance guidelines
- call/engagement guides.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

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