



Australian Government

BSBCUE303 Conduct a telemarketing campaign

Release: 1

BSBCUE303 Conduct a telemarketing campaign

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 prepare, conduct and review a telemarketing campaign, which may involve both inbound and outbound calling.

It applies to individuals who apply a broad range of competencies in a varied work context, using some discretion and judgment and relevant theoretical knowledge, and who may provide technical advice and support to a team.

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 telemarketing campaign	1.1 Study and clarify campaign details with team members, and prepare engagement guides for telemarketing campaign 1.2 Learn features of product or service to be marketed 1.3 Discuss operational boundaries and targets with relevant personnel 1.4 Develop proficiency using relevant technology 1.5 Develop strategies to achieve sales targets 1.6 Identify and develop a clear understanding of fulfilment processes 1.7 Ensure campaign and engagement guides meet relevant

ELEMENT	PERFORMANCE CRITERIA
	legislation, codes, regulations and standards
2 Conduct planned telemarketing activity	2.1 Make customer engagement in most efficient manner possible 2.2 Conduct engagement according to engagement guide, and enterprise policies and procedures 2.3 Answer customer queries with professional responses, using active listening 2.4 Explain features and benefits of products or services to customers, where appropriate 2.5 Improvise on engagement guide content to suit customer needs 2.6 Identify positive sales responses from customers and develop them into sales opportunities 2.7 Close sales efficiently 2.8 Escalate customer queries that cannot be satisfied, according to enterprise policy
3 Manage negative customer responses	3.1 Counter negative customer responses to product, service or organisation with positive features and benefits 3.2 Respond politely to personal or irrelevant negative customer responses 3.3 Identify limits of the organisation's tolerance to negatively responding customers and end negative customer engagement accordingly 3.4 Escalate negative customer responses appropriately 3.5 Develop strategies to recover from negative customer responses and remain positive for next engagement
4 Complete sales	4.1 Record details of sale according to procedures 4.2 Discuss and agree payment arrangements with customer and action according to organisational policy 4.3 Advise customer of payment procedures 4.4 Record and verify credit card details with customer where appropriate and according to organisational protocols 4.5 Discuss and agree delivery arrangements with customer and record and action, where applicable 4.6 Activate fulfilment processes necessary to complete sale 4.7 Apply privacy requirements during transactions
5 Record campaign	5.1 Collate and present engagement records according to

ELEMENT	PERFORMANCE CRITERIA
results	organisational policy 5.2 Record and report difficulties not escalated 5.3 Analyse performance against agreed targets to identify future improvements 5.4 Amend errors and omissions in databases

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, 1.2, 1.6, 1.7	Recognises and interprets information from relevant sources to determine product features, regulatory standards and organisational requirements
Writing	1.1, 1.7, 2.8, 4.1, 4.4, 4.5, 5.2, 5.4	- Develops instructions using appropriate register and vocabulary for use by telemarketers - Records details related to customer interaction and outcomes using concise expression and industry terminology - Records and amends sales data, identifies problems and specifies further action as required
Oral Communication	1.1, 1.3, 2.1-2.4, 2.6, 2.7, 3.1, 3.2, 4.2-4.5	Articulates clearly using specific and relevant language suitable to audience to convey requirements, and uses listening and questioning to confirm understanding
Numeracy	1.1, 1.3, 4.2	Interprets numerical information and applies basic mathematical calculations to analyse and validate data
Navigate the world of work	1.7, 2.2, 2.8, 4.2, 4.4, 4.7 5.1,	Takes personal responsibility for adherence to legal/regulatory requirements, codes and standards, and organisational policies and procedures in planning and performing work role
Interact with others	1.1, 1.3, 2.1-2.8, 3.1-3.5	- Cooperates with others as part of shared work responsibilities and participates in discussions with team and supervisors to reach understanding and agreement - Pays attention to needs and responses of customers, making adjustments to language, vocabulary, tone and

		style to achieve successful transactions or termination of negative interactions as required • Cooperates with others when escalating customer queries and responses • Identifies how to use interpersonal skills to maintain a positive attitude after negative experiences in work context
Get the work done	1.1-1.5, 1.7, 2.1-2.8, 3.4, 3.5, 4.6, 4.7, 5.3, 5.4	• Plans and implements tasks required for a telemarketing campaign, taking some limited responsibility for decisions regarding sales techniques and customer management to meet defined targets • Analyses and reviews performance results and identifies improvement opportunities • Understands purposes, specific functions and key features of common digital systems and tools and operates them effectively to complete routine tasks, adapting some functions to improve personal efficiency

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBCUE303 Conduct a telemarketing campaign	BSBCCO303B Conduct a telemarketing campaign	Updated to meet Standards for Training Packages Code 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 BSBCUE303 Conduct a telemarketing campaign

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Performance Evidence

Evidence of the ability to:

- meet agreed engagement and sales ratios and achieve sales targets
- prepare and use an engagement guide effectively
- manage negative customer engagement in accordance with organisation procedures and standards
- record sales, payments and delivery arrangements accurately using systems technology
- summarise results against targets, report difficulties and improvement opportunities.

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:

- identify legislative and regulatory codes and requirements relating to conducting a telemarketing campaign
- outline marketing principles and practice
- explain operational environment: customer base, company products and services
- identify organisational policies and protocols associated with customer service and sales
- explain sales techniques, fulfilment processes, and technology and systems employed.

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:

- communication technology and database systems in real or simulated workplace
- workplace information and data, including:

- call/engagement guides
- performance managements, sales performance and quality assurance documentation
- records and relevant legislation
- regulatory requirements
- organisational standards and guidelines.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

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