



**Australian Government**

# **BSBCUE304 Provide sales solutions to customers**

**Release: 1**

## BSBCUE304 Provide sales solutions to customers

### 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 process sales enquiries requiring complex solutions, and to follow up to ensure customer satisfaction.

It applies to individuals who apply a broad range of competencies in a varied work context, using some discretion and judgement 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 Identify customer needs                        | <p>1.1 Question customers in detail and listen actively to determine product and service requirements</p> <p>1.2 Verify and agree customer needs with customer</p> <p>1.3 Access existing customer records and offer technical and specialist advice to customer, where such advice is considered beneficial to closing of the sale and customer understanding and decision-making</p> <p>1.4 Identify customer's financial limitations</p> <p>1.5 Discuss estimates and quotes with team and specialist staff if necessary, prior to submission to customer</p> |

| ELEMENT                                | PERFORMANCE CRITERIA                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|----------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 2 Respond to customer needs            | <ul style="list-style-type: none"><li>2.1 Prepare, present and discuss estimates and quotes with customer, as role permits</li><li>2.2 Fully explain benefits of various options and pricing structures to customer</li><li>2.3 Give customer opportunity to question options and quotes provided</li><li>2.4 Promote advantages of dealing with the organisation</li><li>2.5 Manage customer objections effectively by promoting specific benefits</li></ul>                                                                                                                                                   |
| 3 Close sales                          | <ul style="list-style-type: none"><li>3.1 Agree on product or service to be purchased with customer</li><li>3.2 Establish customer's preferred purchase and payment arrangements</li><li>3.3 Finalise documentation relating to sale and forward to customer for agreement and signature</li><li>3.4 Negotiate and arrange payment method with customer</li><li>3.5 Conduct appropriate credit checks</li><li>3.6 Clearly record delivery/installation arrangements as agreed with customer</li><li>3.7 Comply with relevant legislation, codes, regulations and standards during engagement and sale</li></ul> |
| 4 Input sales records                  | <ul style="list-style-type: none"><li>4.1 Fully record details of sale</li><li>4.2 Amend existing customer records where appropriate</li><li>4.3 Initiate invoices according to organisational policy</li><li>4.4 Organise delivery/installation according to organisational policy</li></ul>                                                                                                                                                                                                                                                                                                                   |
| 5 Provide sales support where required | <ul style="list-style-type: none"><li>5.1 Verify customer satisfaction after delivery/installation</li><li>5.2 Identify additional action to satisfy customer needs</li><li>5.3 Initiate action in an efficient and timely manner</li></ul>                                                                                                                                                                                                                                                                                                                                                                     |

## 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                    | 1.3                                       | <ul style="list-style-type: none"> <li>Recognises and interprets textual information from relevant sources to determine customer requirements</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                        |
| Writing                    | 3.3, 3.6, 4.1-4.3                         | <ul style="list-style-type: none"> <li>Prepares specific information, in formats required by organisation, to conduct and close sales</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                |
| Oral Communication         | 1.1-1.3, 2.1-2.3, 3.1, 3.2, 3.4, 3.6, 5.1 | <ul style="list-style-type: none"> <li>Articulates clearly using specific and relevant language suitable to audience to convey requirements, and listening and questioning to confirm understanding</li> <li>Elicits views and opinions of others by listening and questioning</li> </ul>                                                                                                                                                                                                                                                       |
| Numeracy                   | 1.4, 2.1, 2.2, 3.4, 3.5                   | <ul style="list-style-type: none"> <li>Interprets numerical information and applies basic mathematical calculations relating to estimates and quotes</li> <li>Extracts, evaluates and compares numerical information</li> </ul>                                                                                                                                                                                                                                                                                                                 |
| Navigate the world of work | 3.7, 4.4                                  | <ul style="list-style-type: none"> <li>Takes personal responsibility for adherence to legal/regulatory requirements and organisational policy in planning and undertaking work</li> </ul>                                                                                                                                                                                                                                                                                                                                                       |
| Interact with others       | 1.1-1.5, 2.1-2.5, 3.1, 3.2, 3.4, 5.1, 5.2 | <ul style="list-style-type: none"> <li>Selects and uses appropriate conventions and protocols when communicating with customers and relevant authorities</li> <li>Recognises importance of establishing rapport to engage customers and provide effective service solutions in complex situations</li> </ul>                                                                                                                                                                                                                                    |
| Get the work done          | 1.3, 2.1, 3.3, 3.5, 3.6, 4.1-4.4, 5.1-5.3 | <ul style="list-style-type: none"> <li>Plans and implements customer sales tasks, accepting stated goals and aiming to achieve them efficiently</li> <li>Uses systematic, analytical processes to gather relevant credit information</li> <li>Recognises and takes responsibility for anticipating and addressing predictable problems to achieve customer satisfaction promptly</li> <li>Uses familiar digital systems and tools to access, organise, analyse, record and display information relevant to customer sales activities</li> </ul> |

## Unit Mapping Information

| Code and title<br>current version | Code and title<br>previous version | Comments | Equivalence status |
|-----------------------------------|------------------------------------|----------|--------------------|
|-----------------------------------|------------------------------------|----------|--------------------|

| <b>Code and title<br/>current version</b>               | <b>Code and title<br/>previous version</b>            | <b>Comments</b>                                                                                              | <b>Equivalence status</b> |
|---------------------------------------------------------|-------------------------------------------------------|--------------------------------------------------------------------------------------------------------------|---------------------------|
| BSBCUE304<br>Provide sales<br>solutions to<br>customers | BSBCCO304C Provide<br>sales solutions to<br>customers | Updated to meet<br>Standards for<br>Training Packages<br><br>Code changed to<br>reflect industry<br>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 BSBCUE304 Provide sales solutions to customers

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### Performance Evidence

Evidence of the ability to:

- recommend product or service to match customer need with a clear explanation of price and payment options
- apply appropriate credit checks
- organise customer payment and delivery details
- record sales, payments and delivery arrangements
- provide after sales service.

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:

- explain estimate and quote procedures
- outline marketing and sales principles and practices
- identify organisational pricing policies
- identify organisational protocols associated with customer service and sales
- identify statutory, regulatory and legislative requirements related to providing sales solutions to customers.

### 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:

- relevant standards, guidelines and legislation, workplace information and data
- relevant office resources and equipment

- a work environment or simulated customer contact centre to observe interaction with customers.

Assessors must satisfy NVR/AQTF assessor requirements.

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