



Australian Government

BSBCUE308 Conduct outbound customer engagement

Release: 1

BSBCUE308 Conduct outbound customer engagement

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 conduct outbound engagements in relation to enquiries or sales of particular products and services to meet both customer and business needs.

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. This work is undertaken with 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 outbound engagement	1.1 Identify engagement details and apply a clear understanding of organisational policies and procedures 1.2 Obtain and study product and service details relating to customer engagement 1.3 Study prepared engagement guides or scripts 1.4 Locate sources of information that may be required to develop product or service expertise, or discuss requirements with team 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 manager
2 Conduct outbound engagement	2.1 Greet customer according to organisational protocol and in a manner that encompasses cultural diversity 2.2 Use engagement guide efficiently to conduct the engagement 2.3 Answer enquiries and negotiate with customers according to policy 2.4 Escalate enquiries that cannot be satisfied immediately 2.5 Conduct engagement closure according to policy
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 Manage customer engagement	4.1 Record details of engagement according to policy 4.2 Record and report difficulties not escalated that may present an opportunity for continuous improvement 4.3 Adapt to requirements and expectations of various customers when working in an outsource environment and dealing with multiple customer bases 4.4 Escalate enquiries or orders that cannot be satisfied immediately 4.5 Supply follow-up information to customer as required and in a timely manner 4.6 Observe relevant legislation, codes, regulations and standards throughout transaction

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	1.1-1.3, 2.2	Identifies, analyses and evaluates text to determine legislative, regulatory and business requirements and confirm expected practices
Writing	4.1, 4.2	Records key information relevant to enquiries and prepares simple reports using correct spelling and punctuation
Oral Communication	1.4, 1.6, 2.1-2.3, 2.5, 3.1-3.3, 3.5, 4.4, 4.5	- Articulates clearly using specific and relevant language suitable to audience to convey information, and uses listening and questioning to confirm understanding - Participates in a verbal exchange of ideas and elicits views and opinions of others by listening and questioning
Navigate the world of work	1.1, 2.3-2.5, 4.1, 4.4, 4.6	- Recognises and follows explicit and implicit protocols and policies associated with customer engagement and escalation of issues - Takes personal responsibility for adherence to legal/regulatory responsibilities relevant to transactions
Interact with others	2.1, 4.3	- Takes some steps to vary structure, style, tone and vocabulary to suit needs of multiple customer bases and different customer expectations - Adjusts personal communication style to engage a culturally diverse customer base
Get the work done	1.1-1.6, 2.1-2.5, 3.1-3.4, 4.2-4.5	- Plans a range of generally routine tasks, accepting stated goals and aiming to achieve them efficiently - Prepares for outbound engagement in logically sequenced steps, in consultation with others as required - Analyses customer needs and selects suitable options, adjusting to customer preferences, and possibility of further service opportunities - Recognises and takes responsibility for addressing predictable, and some less predictable customer problems, recognising some are indicators of improvement opportunities - Understands purposes, specific functions and key features of common digital systems and tools and operates them effectively to complete routine tasks

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBCUE308 Conduct outbound customer engagement	BSBCCO308A Conduct outbound customer contact	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 BSBCUE308 Conduct outbound customer engagement

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Performance Evidence

Evidence of the ability to:

- comply with organisational policy and procedures in preparation, conduct and closure of outbound customer engagements
- use and adapt communication skills for a wide customer base and different customer expectations
- use technology efficiently to record and manage engagement data.

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 company, products and services, and customer base
- identify organisational communication channels
- explain organisational performance and customer service expectations
- identify organisational policies, procedures, protocols and guidelines, including financial delegation policy
- explain principles of customer service
- explain principles of sales and negotiation
- outline operation of technology and systems used.

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 equipment

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

Assessors must satisfy NVR/AQTF assessor requirements.

Links

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