



**Australian Government**

# **BSBCUE605 Develop and maintain a customer engagement marketing strategy**

**Release: 1**

# BSBCUE605 Develop and maintain a customer engagement marketing strategy

## 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 develop, maintain and promote a marketing strategy in a customer engagement environment.

It applies to individuals who analyse, design and execute judgements using wide ranging technical, creative, conceptual or managerial competencies and who are often accountable for group outcomes.

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 Apply sales and marketing principles to performance | 1.1 Select a valid framework of sales and marketing principles for a customer contact centre<br>1.2 Achieve consensus on sales and marketing principles with stakeholders<br>1.3 Integrate sales and marketing principles into customer contact operating objectives and strategies<br>1.4 Identify elements of customer engagement centre supply chains<br>1.5 Promote engagement centre effectively to supply chain customers |

| ELEMENT                                                          | PERFORMANCE CRITERIA                                                                                                                                                                                                                                                                                                                                                                      |
|------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 2 Initiate, evaluate and maintain a marketing database system    | 2.1 Identify appropriate marketing database fields and functions<br>2.2 Contribute to the development and testing of a marketing database<br>2.3 Evaluate and enhance functionality of the marketing database to best serve the marketing operation<br>2.4 Establish effective database maintenance procedures<br>2.5 Establish contingency planning for failure of databases and systems |
| 3 Develop and evaluate customer service and retention strategies | 3.1 Identify effective after-sales support strategies<br>3.2 Develop strategies to retain customers and to build loyalty<br>3.3 Establish processes to facilitate after-sales support and customer retention strategies<br>3.4 Monitor and review after-sales support and customer retention processes<br>3.5 Adjust processes to optimise customer service and retention                 |
| 4 Analyse sales and customer activity results                    | 4.1 Identify sales and service report criteria relevant to the interests of stakeholders<br>4.2 Analyse sales and service data in relation to key performance indicators<br>4.3 Report on performance and activity data to stakeholders in a timely manner                                                                                                                                |

## 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 | 1.4, 3.1                          | <ul style="list-style-type: none"><li>Recognises and evaluates complex texts to determine key information</li></ul>                                                                                       |
| Writing | 1.2, 1.3, 1.5, 2.2, 3.2, 3.4, 4.3 | <ul style="list-style-type: none"><li>Prepares information which incorporates specialised and cohesive language in a designated format and style appropriate to a specific audience and purpose</li></ul> |
| Oral    | 1.2, 1.5, 4.3                     | <ul style="list-style-type: none"><li>Presents information to a range of audiences using</li></ul>                                                                                                        |

|                      |                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|----------------------|----------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Communication        |                                                                      | appropriate structure and language <ul style="list-style-type: none"> <li>• Uses questioning and active listening to clarify or confirm understanding</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Numeracy             | 2.1, 4.2                                                             | <ul style="list-style-type: none"> <li>• Extracts, evaluates and compares numerical information</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| Interact with others | 1.2, 1.5, 3.4, 4.3                                                   | <ul style="list-style-type: none"> <li>• Recognises and applies the protocols governing what to communicate and how in relation to stakeholders</li> <li>• Uses a range of persuasive techniques appropriate to audience and environment to negotiate agreeable outcomes</li> </ul>                                                                                                                                                                                                                                                                                                                                                            |
| Get the work done    | 1.1, 1.3, 1.4, 2.1, 2.2, 2.3, 2.4, 2.5, 3.1, 3.4, 3.5, 4.1, 4.2, 4.3 | <ul style="list-style-type: none"> <li>• Sequences and schedules complex activities, monitors implementation and manages relevant communication in relation to database maintenance, contingency planning and retention strategies</li> <li>• Makes a range of critical and non-critical decisions in relatively complex strategy-development situations, taking a range of constraints into account</li> <li>• Uses analytical processes to decide on a course of action, establishing criteria for deciding between options when developing strategies</li> <li>• Uses digital tools to access, analyse and organise complex data</li> </ul> |

## Unit Mapping Information

| Code and title<br>current version                                          | Code and title<br>previous version                                       | Comments                                                                                         | Equivalence status |
|----------------------------------------------------------------------------|--------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------|--------------------|
| BSBCUE605<br>Develop and maintain a customer engagement marketing strategy | BSBCCO605B<br>Develop and maintain a customer contact marketing strategy | Updated to meet Standards for Training Packages<br><br>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 BSBCUE605 Develop and maintain a customer engagement marketing strategy

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## Performance Evidence

Evidence of the ability to:

- apply marketing principles to customer engagement performance
- develop and maintain a marketing database system, including contingency planning
- develop customer service and retention strategies and integrate them into operating objectives and strategies
- communicate with stakeholders to promote the call centre, achieve consensus on sales and marketing principles, identify sales and services reporting criteria and report on performance and activity
- analyse and report on performance within a customer engagement environment.

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 engagement centre information systems and the types of data and information available from these systems
- explain contingency-planning principles
- outline customer retention strategies and industry and marketplace/competitor marketing strategies
- describe information technology options and functionality within the customer engagement centre environment
- identify process review and documentation processes
- outline sales and marketing principles
- outline the use and development of databases.

## 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 and databases for analysis activities
- relevant legislation, regulations, standards and guidelines
- stakeholder feedback and sales and customer activity results to analyse
- performance and target data
- case studies and, where possible, real situations.

Assessors must satisfy NVR/AQTF assessor requirements.

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