



Australian Government

BSBMKG529 Manage client account

Release: 1

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Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 2.0.

Application

This unit describes the skills and knowledge required to profile, plan, support and improve a client account to meet agreed objectives.

It applies to individuals working in a variety of marketing communications occupational roles who have responsibility for managing a client relationship and assisting the client to achieve strategy outcomes.

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

Unit Sector

Business Development – Marketing

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. Profile client accounts	1.1 Identify and confirm client accounts with senior management 1.2 Establish product and brand knowledge and clarify objectives with client 1.3 Undertake analysis of client strengths, weakness and expectations for account performance 1.4 Confirm communication channels with client 1.5 Recognise and incorporate account management requirements within current legislation, regulation and organisational policy
2. Implement account management plan	2.1 Establish key account performance indicators with client 2.2 Identify account events and campaigns over agreed timeframes

ELEMENT	PERFORMANCE CRITERIA
	2.3 Prepare account budgets for approval 2.4 Enable adequate resources to meet account management needs 2.5 Prepare briefs of requirements for internal departments, staff and external specialists as required 2.6 Oversee production of events and campaigns to meet client requirements
3. Represent accounts	3.1 Build trust and respect for the client within the organisation and marketplace 3.2 Maintain effective communication channels with client 3.3 Seek regular feedback on performance and adjust as necessary
4. Identify opportunities for improvement	4.1 Undertake account reviews with client and own management 4.2 Identify performance against agreed indicators 4.3 Recommended revisions to account plan to meet client requirements 4.4 Manage client expectations of performance to meet market conditions

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	1.1-1.5, 4.1, 4.2	- Identifies and analyses texts to determine legislative, regulatory and organisational requirements - Recognises and interprets textual information to establish understanding of client, and client's expectations
Writing	1.1-1.4, 2.3, 2.5, 4.1, 4.3	Researches, plans and prepares documentation using format and language appropriate to context, purpose and audience
Oral Communications	1.1, 1.2, 1.4, 2.1, 2.3, 3.2, 3.3, 4.1, 4.3	- Presents information and seeks advice using language appropriate to audience - Participates in discussions using listening and questioning to elicit the views of others and to clarify

		or confirm understanding
Numeracy	2.1-2.4, 4.2	- Interprets and uses mathematical skills to set timeframes, budgets and performance indicators, as well as manage resource planning - Evaluates data to monitor progress
Navigate the world of work	1.5, 2.6, 4.2	Recognises and follows legislative requirements and organisational policies and procedures associated with own role
Interact with others	1.1, 1.2, 1.4, 2.1, 2.3, 2.5, 3.1-3.3, 4.1, 4.3, 4.4	- Selects and uses appropriate conventions and protocols when communicating with clients and external specialists, as well as internal management, other departments and staff to seek or share information - Maintains regular communication with client, consulting and negotiating positive outcomes on a range of topics
Get the work done	1.5, 2.2-2.6, 4.1, 4.3	- Plans, organises and implements work activities of self and others that ensure compliance with organisational policies and procedures, and legislative requirements - Sequences and schedules activities, monitors implementation, and manages relevant communication - Uses systematic, analytical processes in relatively complex situations, setting goals, gathering relevant information, and identifying and evaluating options against agreed criteria - Evaluates outcomes of decisions to identify opportunities for improvement

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBMKG529 Manage client account	Not applicable	New unit	No 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 BSBMKG529 Manage client account

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Performance Evidence

Evidence of the ability to:

- interpret client instructions to establish key performance requirements
- undertake a SWOT analysis of client's marketing communications
- establish and maintain effective communications with a client
- prepare an account plan and budget over an agreed timescale
- prepare client briefs for production and other works or activities.

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 client products, brand and strategy in the marketplace
- list common industry account management performance indicators
- identify contract law as it applies to account management
- identify industry trends and characteristics relevant to a client's products and brand.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the marketing communications field of work and include access to:

- relevant legislation and regulations
- communications equipment and technology
- relevant workplace documentation and resources
- case studies or, where possible, real situations
- industry software packages and apps (where applicable).

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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