



**Australian Government**

# **BSBMKG529 Manage client account**

**Release: 1**

## BSBMKG529 Manage client account

### 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<br>1.2 Establish product and brand knowledge and clarify objectives with client<br>1.3 Undertake analysis of client strengths, weakness and expectations for account performance<br>1.4 Confirm communication channels with client<br>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<br>2.2 Identify account events and campaigns over agreed timeframes                                                                                                                                                                                                                                                                                                     |

| ELEMENT                                   | PERFORMANCE CRITERIA                                                                                                                                                                                                                                                                                |
|-------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                           | 2.3 Prepare account budgets for approval<br>2.4 Enable adequate resources to meet account management needs<br>2.5 Prepare briefs of requirements for internal departments, staff and external specialists as required<br>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<br>3.2 Maintain effective communication channels with client<br>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<br>4.2 Identify performance against agreed indicators<br>4.3 Recommended revisions to account plan to meet client requirements<br>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                           | <ul style="list-style-type: none"> <li>Identifies and analyses texts to determine legislative, regulatory and organisational requirements</li> <li>Recognises and interprets textual information to establish understanding of client, and client's expectations</li> </ul> |
| Writing             | 1.1-1.4, 2.3, 2.5, 4.1, 4.3                 | <ul style="list-style-type: none"> <li>Researches, plans and prepares documentation using format and language appropriate to context, purpose and audience</li> </ul>                                                                                                       |
| Oral Communications | 1.1, 1.2, 1.4, 2.1, 2.3, 3.2, 3.3, 4.1, 4.3 | <ul style="list-style-type: none"> <li>Presents information and seeks advice using language appropriate to audience</li> <li>Participates in discussions using listening and questioning to elicit the views of others and to clarify</li> </ul>                            |

|                            |                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|----------------------------|------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                            |                                                      | or confirm understanding                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Numeracy                   | 2.1-2.4, 4.2                                         | <ul style="list-style-type: none"> <li>Interprets and uses mathematical skills to set timeframes, budgets and performance indicators, as well as manage resource planning</li> <li>Evaluates data to monitor progress</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                 |
| Navigate the world of work | 1.5, 2.6, 4.2                                        | <ul style="list-style-type: none"> <li>Recognises and follows legislative requirements and organisational policies and procedures associated with own role</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| 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 | <ul style="list-style-type: none"> <li>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</li> <li>Maintains regular communication with client, consulting and negotiating positive outcomes on a range of topics</li> </ul>                                                                                                                                                                                                                              |
| Get the work done          | 1.5, 2.2-2.6, 4.1, 4.3                               | <ul style="list-style-type: none"> <li>Plans, organises and implements work activities of self and others that ensure compliance with organisational policies and procedures, and legislative requirements</li> <li>Sequences and schedules activities, monitors implementation, and manages relevant communication</li> <li>Uses systematic, analytical processes in relatively complex situations, setting goals, gathering relevant information, and identifying and evaluating options against agreed criteria</li> <li>Evaluates outcomes of decisions to identify opportunities for improvement</li> </ul> |

## Unit Mapping Information

| Code and title<br>current version     | Code and title<br>previous version | Comments | Equivalence status |
|---------------------------------------|------------------------------------|----------|--------------------|
| BSBMKG529<br>Manage client<br>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>