



Australian Government

BSBOPS202 Engage with customers

Release: 1

BSBOPS202 Engage with customers

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 7.0.

Application

This unit describes the skills and knowledge required to participate effectively in customer engagement, including complying with organisational requirements and using a variety of communication methods.

The unit applies to those who perform a range of mainly routine tasks, using limited practical skills and fundamental operational knowledge and who work under some supervision and guidance.

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

Unit Sector

Business Competence – Business Operations

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. Establish customer demands	1.1 Identify personal targets and key performance indicators (KPIs) for customer engagement according to organisational policy and procedures 1.2 Identify and confirm customer requirements 1.3 Identify options to meet customer expectations according to organisational policies and procedures 1.4 Adapt options to customer requirements according to organisational policies
2. Provide customer service	2.1 Select product or service in consultation with customer 2.2 Explain relevant information and actions to customer and confirm all details

ELEMENT	PERFORMANCE CRITERIA
	2.3 Action customer orders and escalate queries that cannot be immediately satisfied according to organisational policies and procedures 2.4 Record details of engagement according to organisational policy
3. Finalise customer engagement	3.1 Supply follow-up information to customer according to organisational policies and procedures 3.2 Evaluate compliance with organisational policies and procedures 3.3 Seek customer feedback and identify opportunities to enhance service on future engagements 3.4 Record and report opportunities for continuous improvement

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

Skill	Description
Reading	Identifies and evaluates a range of texts to determine product information, performance standards and guidelines, and business requirements
Writing	Prepares clear and specific information which conveys an understanding of service requirements, outcomes and alternatives for customers and workplace personnel
Oral communication	Articulates clearly, using industry-specific language suitable to audience to convey requirements and listening and questioning techniques to confirm understanding
Enterprise and initiative	Identifies organisational expectations and follows explicit protocols and procedures, regulations and standards in performance of job role
Teamwork	- Follows accepted communication practices and protocols in the provision of customer service - Adjusts communication style in response to differences in customer profile, expectations and requirements
Planning and organising	- Plans and implements routine customer service tasks and related workload, making limited decisions on sequencing and timing with support as required from relevant personnel - Analyses task requirements to decide on appropriate customer service options - Identifies difficulties that might present continuous improvement

Skill	Description
	opportunities
Technology	Identifies key features of common digital systems and tools and operates them effectively to manage customer communication

Unit Mapping Information

No equivalent unit. Supersedes but is not equivalent to:

- BSBCUE203 Conduct customer engagement
- BSBCUE205 Prepare for work in a customer engagement environment
- BSBCUE302 Deploy customer service field staff
- BSBCUE307 Work effectively in customer engagement.

Links

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBOPS202 Engage with customers

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Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- engage with at least three different customers, by:
 - providing customer service according to organisational standards and guidelines
 - using communication equipment and systems efficiently and effectively
 - adapting communication techniques to suit customer profile and requirements.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- operational environment, including customer base and products and services of the organisation
- organisational performance standards and customer service expectations
- organisational policies, procedures, protocols for customer engagement
- relevant product or service details
- equipment and systems to manage customer engagement
- customer service in different contexts and customer behaviour in different contexts
- sources of information to develop customer service skills including relevant organisational personnel
- follow-up considerations for customer queries, including:
 - engagement escalation policy
 - business rules and practices
 - customer expectations
- principles of customer service
- continuous improvement methods including customer retention strategies
- procedures for the operation of telecommunication equipment and systems, relevant to customer service.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- workplace information and data
- performance management records and data and quality assurance guidelines
- customer engagement policies and procedures.

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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