



Australian Government

BSBOPS306 Record stakeholder interactions

Release: 1

BSBOPS306 Record stakeholder interactions

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 create a record of information in a customer management system (CMS) gathered from a stakeholder interaction as a result of an engagement activity.

The unit applies to those responsible for engaging with stakeholders for a range of purposes and in a range of contexts. It also applies to those who create a record of stakeholder interaction.

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. Prepare to record stakeholder interaction	1.1 Collect information from stakeholder interaction 1.2 Review purpose of stakeholder interaction 1.3 Review information collected from stakeholder interaction. 1.4 Identify organisational policies and procedures and determine information to be included in record
2. Create record of stakeholder interaction	2.1 Enter details of stakeholder interaction in required CMS fields according to organisational policies, procedures and protocols 2.2 Check that collected information has been attributed to appropriate stakeholder in CMS
3. Finalise and review	3.1 Confirm that records represent stakeholder views, are free of

ELEMENT	PERFORMANCE CRITERIA
recording process	bias and opinion, and comply with organisational requirements 3.2 Check completeness and discoverability of record 3.3 Complete required processes for finalising and saving created record in CMS according to organisational policies and procedures

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	Identifies and interprets textual information
Writing	Records spoken information clearly and accurately for future reference
Oral communication	- Presents or requests information using words and non-verbal features appropriate to the audience and context - Uses listening and questioning techniques to gather information and confirm understanding
Planning and organising	- Takes responsibility for planning, sequencing and completing tasks to achieve required outcomes - Follows organisational communication practices and procedures
Problem-solving	Addresses less predictable problems applying problem solving processes in determining solutions that meet organisational requirements
Technology	Uses the main features and functions of digital tools to complete work tasks

Unit Mapping Information

No equivalent unit. New unit.

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 BSBOPS306 Record stakeholder interactions

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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:

- create a record of information collected from a stakeholder interaction in a Customer Management System (CMS) for at least three different stakeholder interactions.

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:

- organisational policies, procedures and protocols for recording stakeholder interactions, including:
 - privacy and confidentiality protocols
 - procedures for recording details of stakeholder interaction in CMS
 - basic note taking methods, including using basic formatting
- basic business writing principles, including plain English principles
- key features of stakeholder interaction activities, including:
 - purpose of interaction
 - context of interaction
 - outcomes of interaction
- information that is relevant to stakeholder interaction purpose
- key features and functions of a CMS, including those relating to record saving.

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:

- technology required to collect and record information

- workplace documents, and organisational policies and procedures relating to stakeholder interactions
- access to a CMS.

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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