



Australian Government

Department of Education, Employment and Workplace Relations

BSBCCO303B Conduct a telemarketing campaign

Release: 1

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Modification History

Release	Comments
Release 1	This version first released with <i>BSB07 Business Training Package version 6.0</i> Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures. Replaces BSBCCO303A Conduct a telemarketing campaign .

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to undertake a telemarketing campaign, which may involve both inbound and outbound calling. Competence in this unit requires preparing, conducting and reviewing the performance of a telemarketing campaign, including managing negative or difficult contacts and completing the sales process.

Application of the Unit

This unit applies in customer contact environments with a focus on sales, using varying levels of technology.

This work is undertaken with some supervision and guidance.

Licensing/Regulatory Information

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

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Element	Performance Criteria
<i>Elements describe the essential outcomes of a unit of competency.</i>	<i>Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.</i>

Elements and Performance Criteria

1. Prepare for telemarketing campaign	1.1 Study and clarify campaign details with team members, and prepare contact guides for telemarketing campaign 1.2 Learn the features of the product or service to be marketed 1.3 Discuss operational boundaries and targets with relevant personnel 1.4 Develop proficiency in the use of relevant technology 1.5 Develop strategies to achieve sales targets 1.6 Identify and develop a clear understanding of fulfilment processes 1.7 Ensure campaign and contact guides meet relevant legislation, codes, regulations and standards
2. Conduct planned telemarketing activity	2.1 Make customer contact in the most efficient manner possible 2.2 Conduct contact according to contact guide, and enterprise policies and procedures 2.3 Answer customer queries with professional responses, using active listening techniques 2.4 Explain features and benefits of products or services to customers, where appropriate 2.5 Improvise on contact guide content to suit customer needs 2.6 Identify positive sales responses from customers and develop them into sales opportunities 2.7 Close sales efficiently 2.8 Escalate customer queries that cannot be satisfied, according to enterprise policy
3. Manage negative customer responses	3.1 Counter negative customer responses to the product, service or organisation with positive features and benefits 3.2 Respond politely to personal or irrelevant negative customer responses 3.3 Identify limits of the organisation's tolerance to negatively responding customers and end negative customer contact accordingly 3.4 Escalate negative customer responses appropriately 3.5 Develop strategies to recover from negative customer responses and remain positive for next contacts
4. Complete sales	4.1 Record details of sale according to procedures 4.2 Discuss and agree payment arrangements with customer and

	action according to organisational policy 4.3 Advise customer of payment procedures 4.4 Record and verify credit card details with customer where appropriate and according to organisational protocols 4.5 Discuss and agree delivery arrangements with customer and record and action, where applicable 4.6 Activate the fulfilment processes necessary to complete the sale 4.7 Apply privacy requirements during the transaction
5. Record campaign results	5.1 Collate and present contact records according to organisational policy 5.2 Record and report difficulties not escalated 5.3 Analyse performance against agreed targets to identify future improvements 5.4 Amend errors and omissions in databases

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- customer service skills to deliver professional customer service and sales support
- interpersonal skills to establish rapport and build relationships with customers
- literacy skills to communicate and articulate information and advice effectively
- numeracy skills to analyse, calculate and validate data
- problem-solving skills to undertake credit risk evaluations that meet organisational credit policy requirements
- sales skills to maximise every contact and sales result
- self-management skills to:
 - conduct activity in a positive and result-focused manner
 - comply with policies and procedures
 - manage stress
 - remain calm when under pressure
 - seek learning and development opportunities
 - work in a team environment.

Required knowledge

- legislative and regulatory codes and requirements relating to conducting a telemarketing campaign
- marketing principles and practice
- operational environment:
 - customer base
 - company products and services
- organisational policies and protocols associated with customer service and sales
- sales techniques
- fulfilment processes
- technology and systems employed.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • meet agreed contact and sales ratios • achieve sales targets • apply pre-prepared contact guide • manage negative customer contact without disrupting operations • record sales, payments and delivery arrangements • successfully handle difficulties incurred during campaign • demonstrate knowledge of legislative and regulatory codes and requirements.
Context of and specific resources for assessment	Assessment must ensure access to: • workplace information and data, including call/contact guides • performance management, sales performance and quality assurance documentation and records • relevant legislation, regulatory requirements, organisational standards and guidelines.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • review of performance and sales results • direct observation during sales process, including negative customer contacts • oral and/or written questioning to assess knowledge of sales techniques, and legislative and regulatory requirements • review of quality assurance records • audit of customer and sales records.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBCCO304C Provide sales solutions to customers • BSBCUS301B Deliver and monitor a service to customers.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Contact guides may include:	• contact-closing techniques • contact flow • escalating policy • features and benefits of product or service • greeting etiquette • pricing • regulatory, legislative and organisational requirements.
Telemarketing campaigns may include:	• customer retention activities, such as re-contracting, loyalty and incentive programs and offering value-added services • fundraising • product sales • service sales • up selling and cross selling.
Product or services may include:	• goods • ideas • infrastructure • private and public sets of benefits.
Operational boundaries may include:	• discretion to deviate from the call/contact guide • guidelines and parameters within which the telemarketer can operate • limits of contact with the customer • mandatory and voluntary requirements • relevant regulatory, legislative and organisational requirements.
Technology may be modified for use by people with a disability and include:	• information systems • sales tracking technology • telecommunications systems.
Sales targets may include:	• call volumes • conversion rates • sales made • retention rates.
Relevant legislation,	• Consumer Credit Code

<i>codes, regulations and standards</i> may include:	• Do Not Call Register • equal employment opportunity and anti-discrimination legislation • freedom of information • industry-specific codes, regulations and legislation • occupational health and safety legislation • Privacy Act • Trade Practices Act/Competition and Consumer Act
<i>Negative customer responses</i> may include:	• criticising the product or organisation • crude or offensive language • declining further contact • personal insults or threats.
<i>Payment arrangements</i> may include:	• cash • cheque • credit card • EFTPOS • money order • payment on delivery.
<i>Credit card details</i> may include:	• cardholder details • card number • card expiry date.
<i>Databases</i> may include:	• business directories • organisational records • sales records • telephone directories.

Unit Sector(s)

Stakeholder relations – contact centre operations

Custom Content Section

Not applicable.