



Australian Government

Department of Education, Employment and Workplace Relations

BSBCCO304C Provide sales solutions to customers

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. Escalation of contact incorporated in range statement. Replaces BSBCCO304B Provide sales solutions to customers.

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to process sales enquiries requiring complex solutions and to follow up to ensure customer satisfaction. Competence in this unit requires effective customer service and sales skills, and the provision of the required levels of sales support for customers. It may involve performing credit checks and using systems and technology at varying levels.

Application of the Unit

This unit applies in inbound and outbound customer contact environments where sales are an element of the role.

The work is undertaken with some supervision and guidance.

Sales may include up-sell or cross-sell activities, as well as new sales or retention activities, such as re-contracting or applying loyalty programs.

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. Identify customer needs	1.1 Question customers in detail and listen actively to determine product and service requirements 1.2 Verify and agree customer needs with the customer 1.3 Access existing customer records and offer technical and specialist advice to customer, where such advice is considered beneficial to the closing of the sale and customer understanding and decision making 1.4 Identify customer's financial limitations 1.5 Discuss estimates and quotes with team and specialist staff if necessary, prior to submission to customer
2. Respond to customer needs	2.1 Prepare, present and discuss estimates and quotes with customer, as the role permits 2.2 Explain fully benefits of the various options and pricing structures to the customer 2.3 Give customer the opportunity to question options and quotes provided 2.4 Promote advantages of dealing with the organisation 2.5 Manage customer objections effectively by promoting specific benefits
3. Close sales	3.1 Agree on product or service to be purchased with the customer 3.2 Establish customer's preferred purchase and payment arrangements 3.3 Finalise documentation relating to sale and forward to customer for agreement and signature 3.4 Negotiate and arrange payment method with customer 3.5 Conduct appropriate credit checks 3.6 Clearly record delivery/installation arrangements as agreed with customer 3.7 Comply with relevant legislation, codes, regulations and standards during the contact and sale
4. Input sales records	4.1 Fully record details of sale 4.2 Amend existing customer records where appropriate 4.3 Initiate invoices according to organisational policy 4.4 Organise delivery/installation according to organisational policy
5. Provide sales support	5.1 Verify customer satisfaction after delivery/installation

where required	5.2 Identify additional action to satisfy customer needs 5.3 Initiate action in an efficient and timely manner
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Required Skills and Knowledge

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

Required skills

- communication skills to communicate with internal and external customers
- customer service and sales skills to operate within sales environment
- literacy skills to clearly articulate information and advice
- negotiation skills to work with difficult contacts or situations
- numeracy skills to accurately analyse and validate data
- planning and organising skills to manage own tasks within required timeframes
- problem-solving skills to apply a range of problem-solving strategies
- self-management skills to:
 - comply with policies and procedures
 - evaluate and monitor own performance
 - have confidence in own ideas
 - seek learning and development opportunities
 - work in a team environment.

Required knowledge

- estimate and quote procedures
- marketing and sales principles and practices
- organisational pricing policies
- organisational protocols associated with customer service and sales
- statutory, regulatory and legislative requirements relating to providing sales solutions to customers.

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: • match product or service to customer need • clearly explain prices relating to product or service offered • apply appropriate credit checks • arrange customer payments • reach agreement with customers as to payment and delivery arrangements • record sales, payments and delivery arrangements.
Context of and specific resources for assessment	Assessment must ensure access to: • relevant standards, guidelines and legislation • workplace information and data • relevant resources • work environment or simulated customer contact centre to observe interaction with customers.
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 • direct observation of interaction with customers • review of record of sale and customer satisfaction • review of agreed payment methods and credit checks • oral and/or written questioning to assess knowledge of security and operational systems and organisational requirements.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBCCO301B Use multiple information systems • 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.

Product and service requirements may include:	- different products or services that meet customer needs, which may include: - pricing differentials - product models - product or service mixes - product or service types.
Technical and specialist advice may include:	- discussion with: - product or service specialists - product or service providers - marketing staff - escalation of contact to: - product or service specialists - product or service providers - marketing staff.
Sale may include:	- amendments to previous sale arrangements - product or service - purchase provision - variation to existing product or service - upgrade of current product or service.
Purchase and payment arrangements may include:	- cash - cheque - credit card - direct debit - money order - payment on delivery.
Credit checks may be:	- automated - undertaken by sales person or by specialist staff within the organisation.
Relevant legislation, codes, regulations and standards may include:	- Consumer Credit Code - equal employment opportunity and anti-discrimination legislation - Privacy Act - Telecommunications Act

	• Trade Practices Act/Competition and Consumer Act
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Unit Sector(s)

Stakeholder relations – contact centre operations

Custom Content Section

Not applicable.