



Australian Government

Department of Education, Employment and Workplace Relations

BSBCCO308A Conduct outbound customer contact

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>

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to make outbound contacts in relation to enquiries or sales of particular products and services. Competence in this unit requires initiating a wide range of customer contacts over a variety of communication methods. Compliance with organisational, legislative and regulatory requirements is required, as is the ability to respond in a manner that meets both customer and business needs.

Application of the Unit

This unit applies in outbound customer contact environments where a variety of communication channels and technologies are used.
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 outbound contact	1.1 Identify contact details and apply a clear understanding of organisational policies and procedures 1.2 Obtain and study product and service details relating to customer contact 1.3 Study prepared contact guides or scripts 1.4 Locate sources of information that may be required to develop product or service expertise, or discuss requirements with team 1.5 Develop proficiency with equipment and systems to effectively and efficiently manage contact 1.6 Clarify details as required with relevant manager
2. Conduct outbound contact	2.1 Greet customer according to organisational protocol and in a manner that encompasses cultural diversity 2.2 Use the contact guide efficiently to conduct the contact 2.3 Answer enquiries and negotiate with customers according to policy 2.4 Escalate enquiries that cannot be satisfied immediately 2.5 Conduct contact closure according to policy
3. Arrange provision of a product or service	3.1 Respond appropriately to customer requirements and identify relevant options 3.2 Select appropriate product or service in consultation with customer 3.3 Agree actions or orders with customer, giving consideration to maximising value and service delivery to customer 3.4 Consider customer retention options that can be applied to the contact 3.5 Use clear, simple and easy to understand language and ensure responses are comprehensive
4. Manage customer contact	4.1 Record details of contact according to policy 4.2 Record and report difficulties not escalated that may present an opportunity for continuous improvement 4.3 Adapt to the requirements and expectations of various customers when working in an outsource environment and dealing with multiple customer bases 4.4 Escalate enquiries or orders that cannot be satisfied immediately

	4.5 Supply follow-up information to customer as required and in a timely manner 4.6 Observe relevant legislation, codes, regulations and standards throughout transaction
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Required Skills and Knowledge

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

Required skills

- customer service skills to deliver required level and quality of customer service
- communication skills to:
 - articulate effectively over the required channels
 - relate to people from diverse backgrounds and with diverse abilities
 - use listening and questioning to understand and clarify the needs of customers
- interpersonal skills to:
 - establish rapport and build relationships with customers
 - handle difficult customers
- negotiation skills to persuade customers and elicit buy-in on the sale of product or service
- numeracy skills to analyse, calculate and validate data
- planning and organising skills to manage own tasks within required timeframes
- self-management skills to:
 - comply with policies and procedures
 - handle peak periods of activity in a positive and enthusiastic manner
 - manage stress
 - seek learning and development opportunities
 - work in a team environment.

Required knowledge

- operational environment, including:
 - company products and services
 - customer base
- organisational communication channels
- organisational performance and customer service expectations
- organisational policies, procedures, protocols and guidelines, including financial delegation policy
- principles of customer service
- principles of sales and negotiation
- stress and time-management techniques
- technology and systems.

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: - record data - demonstrate knowledge of enterprise products and services and compliance requirements - meet agreed standards of contact - achieve performance targets - use technology, which may be modified for use by people with a disability.
Context of and specific resources for assessment	Assessment must ensure access to: - IT equipment - workplace information and data - performance management records and data - quality assurance guidelines and call/contact guides.
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 during contact, which may be done by double jacking on telephone system - review of documentation of performance against targets - review of quality assurance feedback - review of accuracy of data and record entry - oral and/or written questioning to assess knowledge of the enterprise, legislative and regulatory requirements, and products and services - observation of practical demonstration of sourcing required information.
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.

<i>Organisational policies and procedures</i> may include:	• adherence to scheduling • scope of the services to be provided • financial and decision-making delegations • referral and escalation paths.
<i>Products and services</i> may include:	• goods • ideas • infrastructure • private and public sets of benefits.
<i>Customer contact</i> may include:	• email and other electronic communications • face-to-face • facsimile • internal, external and outsourced customers • letter • telephone.
<i>Contact guides or scripts</i> may relate to:	• contact-closing technique • contact flow • features and benefits of product or service • greeting etiquette • pricing • regulatory, legislative and organisational requirements.
<i>Sources of information</i> may include:	• brochures and pamphlets • campaign briefs • internet and intranet • instruction or product manuals.
<i>Equipment and systems</i> may include:	• computer and telecommunications equipment, which may be modified for use by people with a disability • information management systems • workflow management systems.
<i>Contact closure</i> may include:	• a shortened sales cycle • overcoming objections • asking defining questions • maximising opportunities • managing complex negotiations

	• increasing productivity and time management • moving to transaction discussion once interest has been elicited.
Responding appropriately may include:	• recording details in enterprise systems • discussing, agreeing and recording supply arrangements with customers • discussing and agreeing on payment options with customers • conducting credit checks.
Customer retention options may include:	• loyalty programs or incentives • offering value-added services or products • re-contracting • special offers as determined by the organisation from time to time.
Outsource environment may include:	• customer contact environment servicing customers of another enterprise or business unit by agreement • customer contact environment taking contacts for multiple enterprises • customer contact environment taking overflow calls for another enterprise.
Relevant legislation, codes, regulations and standards may include:	• Consumer Credit Code • 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

Unit Sector(s)

Stakeholder relations – contact centre operations

Custom Content Section

Not applicable.