



**Australian Government**

**Department of Education, Employment and Workplace Relations**

# **BSBCCO605B Develop and maintain a customer contact marketing strategy**

**Release: 1**

## BSBCCO605B Develop and maintain a customer contact marketing strategy

### Modification History

| Release   | Comments                                                                                                                                                                                                                                                                                                                |
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| Release 1 | <p>This version first released with <i>BSB07 Business Training Package version 6.0</i></p> <p>Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures.</p> <p>Replaces BSBCCO605A Develop and maintain a customer contact marketing strategy</p> |

### Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to develop, maintain and promote a marketing strategy in a customer contact environment. Competence in this unit requires developing, implementing and reviewing a marketing strategy, and building strong relationships with all stakeholders. The effective use and development of systems, databases and reporting tools are also required.

### Application of the Unit

This unit applies to establishing a marketing strategy in a customer contact environment that has sales and marketing opportunities for either internal or external (outsource) stakeholders. This role is undertaken by staff with managerial responsibility.

### 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. Apply sales and marketing principles to contact centre performance | <p>1.1 Select a valid framework of sales and marketing principles for a customer contact centre</p> <p>1.2 Achieve consensus on sales and marketing principles with <b>stakeholders</b></p> <p>1.3 Integrate sales and marketing principles into customer contact operating objectives and strategies</p> <p>1.4 Identify elements of customer contact centre <b>supply chains</b></p> <p>1.5 Promote contact centre effectively to supply chain customers</p> |
| 2. Initiate, evaluate and maintain a marketing database system        | <p>2.1 Identify appropriate <b>marketing database fields</b> and functions</p> <p>2.2 Contribute to the development and testing of a marketing database</p> <p>2.3 Evaluate and enhance functionality of the marketing database to best serve the marketing operation</p> <p>2.4 Establish effective database maintenance procedures</p> <p>2.5 Establish <b>contingency planning</b> for failure of databases and systems</p>                                 |
| 3. Develop and evaluate customer service and retention strategies     | <p>3.1 Identify effective after-sales support strategies</p> <p>3.2 Develop strategies to retain customers and to build loyalty</p> <p>3.3 Establish processes to facilitate <b>after-sales support and customer retention strategies</b></p> <p>3.4 Monitor and review after-sales support and customer retention processes</p> <p>3.5 Adjust processes to optimise customer service and retention</p>                                                        |
| 4. Analyse sales and customer activity results                        | <p>4.1 Identify sales and service report criteria relevant to the interests of stakeholders</p> <p>4.2 Analyse sales and service data in relation to key performance indicators</p> <p>4.3 Report on performance and activity data to stakeholders in a timely manner</p>                                                                                                                                                                                      |

## Required Skills and Knowledge

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

### Required skills

- analytical skills to:
  - analyse workplace information and data
  - assess compliance with relevant legislative, regulatory and organisational requirements
  - consider all options and support the development of the strategy
- communication skills to:
  - communicate effectively with personnel at all levels
  - conduct effective formal and informal meetings
- consultation and negotiation skills to develop, implement and monitor strategies
- interpersonal skills to:
  - establish rapport and build relationships with internal and external customers, team members and stakeholders
  - establish relevant networks
- leadership skills to gain the trust and confidence of colleagues and clients
- literacy skills to:
  - prepare and present reports on complex concepts and ideas
  - write policies, procedures and plans
- numeracy skills to:
  - manage budgetary resources
  - understand, verify, manipulate and calculate data and statistics
- planning and organising skills to manage own tasks within required timeframes
- presentation skills to articulate information and ideas effectively
- problem-solving skills to create innovative solutions to problems that arise
- project management skills to:
  - develop and implement the strategy successfully
  - achieve ongoing continuous improvement
- risk assessment and mitigation skills to fully understand and, if necessary, mitigate potential impacts of activities
- self-management skills to:
  - comply with policies and procedures
  - pay attention to detail when making observations and recording outcomes
  - seek learning and development opportunities
- technology skills to organise, manage and analyse data.

### Required knowledge

- contact centre information systems and the types of data and information available from these systems
- contingency planning principles
- customer retention strategies
- industry and marketplace/competitor marketing strategies

- information technology options and functionality within the customer contact centre environment
- process review and documentation processes
- sales and marketing principles
- use and development of databases.

## 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.*

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| <b>Overview of assessment</b>                                                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Critical aspects for assessment and evidence required to demonstrate competency in this unit</b> | <p>Evidence of the ability to:</p> <ul style="list-style-type: none"> <li>• apply marketing principles to customer contact performance</li> <li>• develop and maintain marketing databases</li> <li>• develop customer service and retention strategies</li> <li>• analyse and report performance within a customer contact environment</li> <li>• demonstrate knowledge of sales and marketing principles.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Context of and specific resources for assessment</b>                                             | <p>Assessment must ensure access to:</p> <ul style="list-style-type: none"> <li>• information and databases for analysis activities</li> <li>• relevant legislation, standards and guidelines</li> <li>• stakeholder feedback or stakeholders</li> <li>• performance and target data.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Method of assessment</b>                                                                         | <p>A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:</p> <ul style="list-style-type: none"> <li>• direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate</li> <li>• review of stakeholder agreed marketing and sales principles</li> <li>• review of records of internal contact centre promotion activities</li> <li>• oral and/or written questioning to assess knowledge of fields and functionality of a marketing database</li> <li>• review of records of maintenance activity for a marketing database</li> <li>• review of documentation of after-sales and/or customer retention strategies</li> <li>• review of records of after-sales and/or customer retention strategy effectiveness</li> <li>• review of reports of sales and customer service performance.</li> </ul> |
| <b>Guidance information for assessment</b>                                                          | <p>Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example:</p> <ul style="list-style-type: none"> <li>• BSBCCO609B Integrate customer contact operations within</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |

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|  | <p>the organisation</p> <ul style="list-style-type: none"><li>• BSBMGT618A Develop a contact centre business plan.</li></ul> |
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## 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.*

|                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|-----------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Stakeholders</b> may include:              | <ul style="list-style-type: none"> <li>• contact centre level: <ul style="list-style-type: none"> <li>• direct team</li> <li>• team leaders</li> <li>• other senior contact centre staff</li> </ul> </li> <li>• enterprise employees at management level with an interest or stake in contact centre operations, including: <ul style="list-style-type: none"> <li>• sales and marketing</li> <li>• credit and collections</li> <li>• billing</li> </ul> </li> <li>• external clients and suppliers with an interest in the marketing aspects of operations, including: <ul style="list-style-type: none"> <li>• contracting organisations</li> <li>• recruitment suppliers</li> <li>• software and equipment suppliers.</li> </ul> </li> </ul> |
| <b>Supply chains</b> may include:             | <ul style="list-style-type: none"> <li>• billing</li> <li>• credit and collections</li> <li>• customer service</li> <li>• fulfilment area</li> <li>• sales and sales support.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Marketing database fields</b> may include: | <ul style="list-style-type: none"> <li>• address: postal, business and residential</li> <li>• contact numbers</li> <li>• current products and services</li> <li>• email address</li> <li>• name</li> <li>• occupation</li> <li>• previous offers.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Contingency planning</b> may include:      | <ul style="list-style-type: none"> <li>• activities to keep business running</li> <li>• contact escalation policy</li> <li>• interactive voice response (IVR) message re reduced level of service</li> <li>• taking messages and calling customers back when systems are back in operation</li> <li>• temporary redirection of calls to another area</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                 |

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|                                                                                  | <ul style="list-style-type: none"><li>• use of back-up systems or database</li><li>• use of manual processes or recording.</li></ul>                                                                                                                                                                                                                                                                                           |
| <b><i>After-sales support and customer retention strategies</i></b> may include: | <ul style="list-style-type: none"><li>• account management</li><li>• courtesy follow-up calls</li><li>• customer satisfaction surveying</li><li>• differentiated levels of customer service and support</li><li>• discounts or special offers</li><li>• follow-up to ensure customer satisfaction and loyalty post-sales experience</li><li>• loyalty programs</li><li>• offers of value-added services or products.</li></ul> |

## Unit Sector(s)

Stakeholder relations – contact centre operations

## Custom Content Section

Not applicable.