



Australian Government

CPPCMN4004 Develop and manage client relations

Release: 1

CPPCMN4004 Develop and manage client relations

Modification History

Release 1.

Revised unit of competency replacing superseded equivalent CPPCMN4004B Facilitate effective client relationships.

This version first released with CPP Property Services Training Package Version 4.

Application

This unit of competency specifies the outcomes required to establish business contacts and networks, and develop and manage these relationships effectively to increase and retain the client base of the company. The unit covers identifying and analysing potential clients and their needs. It also covers exploring products or services with the client that could improve or enhance their operations, which requires knowledge of the range of organisational products and services. The unit involves managing client problems, issues and changing needs; and identifying opportunities to promote additional products and services to meet those needs.

The unit supports those with significant contact with external clients but without managerial or supervisory responsibilities. It applies to those providing information on routine, well-defined products and services, and dealing with enquiries of a more complex nature, including pricing. Performance would usually be carried out under routine supervision, within company guidelines.

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

Pre-requisite Unit

Nil

Unit Sector

Common

Elements and Performance Criteria

Elements describe the essential outcomes.

Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the range of conditions.

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| 1. Establish new business contacts. | 1.1. New organisations with potential to benefit from company products and services are identified according to company requirements. |
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- 1.2. Individuals in target organisations with potential to benefit are identified and contacted, and effective relationships built according to **company requirements**.
 - 1.3. **Communication protocols** are agreed with business contacts and maintained according to own level of responsibility and company requirements.
2. Work effectively with business contacts.
 - 2.1. Roles of business contacts are clarified and responsibilities of parties in business relationship are agreed according to company requirements.
 - 2.2. Realistic service commitments are set and adhered to according to company requirements.
 - 2.3. Flexibility in work practices required in unusual or difficult situations is adopted according to company requirements.
 - 2.4. Situations outside own area or level of responsibility are identified and, where appropriate, referred to designated **personnel** according to company requirements.
3. Identify and monitor client needs.
 - 3.1. Needs and expectations for service delivery are regularly discussed with client according to company requirements.
 - 3.2. Feedback on company performance and level of satisfaction is sought from client according to company requirements.
 - 3.3. Prompt action is taken on feedback received according to company requirements.
 - 3.4. Contracts or variations to contracts or levels of agreed service provision are reviewed and implemented according to company requirements.
4. Respond to complex client needs.
 - 4.1. Complex client needs are analysed and options for resolution are explained to client according to company requirements.
 - 4.2. Clients are assisted to evaluate product and service options to satisfy their needs according to company requirements.
 - 4.3. Preferred action is determined and prioritised according to company requirements.

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| | 4.4. | Potential difficulties in service delivery are identified and actions taken according to company requirements. |
| 5. Communicate advice and pricing information. | 5.1. | Pricing information for routine and specified products and services is provided where these match client needs, according to company requirements. |
| | 5.2. | Follow-up information required by client is provided promptly according to company requirements. |
| | 5.3. | Bookings with client are scheduled and confirmed according to company requirements. |
| 6. Promote company. | 6.1. | Strategies to represent, promote and grow company's interests are developed. |
| | 6.2. | Additional products, services and information are suggested to clients according to company requirements. |
| | 6.3. | Information is provided to company members to support the development of effective relationships with client. |

Foundation Skills

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

Performance feature

Skill

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| Learning skills to: | • apply prior knowledge of company offerings to select required services or products to meet identified client needs. |
| Numeracy skills to: | • provide routine pricing information, including estimating volume of product or service required and calculation of cost over time. |
| Oral communication skills to: | • present information to clients professionally, using a range of presentation techniques
• use questioning skills to identify fine details of client requirements. |
| Reading skills to: | • interpret updates on company product and service information. |
| Writing skills to: | • communicate with clients by email to convey information about products, services and solutions to complex requests. |

Range of Conditions

This section specifies work environments and conditions that may affect performance. Essential operating conditions that may be present (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) are included. Bold italicised wording, if used in the performance criteria, is detailed below.

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| <i>Company requirements</i> must include at least two of the following: | <ul style="list-style-type: none">• organisational policies and guidelines• legislative and regulatory requirements relating to the work or service function, including:<ul style="list-style-type: none">• anti-discrimination and equal employment opportunity• industry codes of conduct• consumer law• environmental law• harassment and other laws specific to local government• work health and safety requirements• privacy legislation• policies and procedures relating to own role and responsibility• quality and continuous improvement systems, standards and guidelines. |
| <i>Communication protocols</i> must include: | <ul style="list-style-type: none">• client's preferred frequency and timing of contact• client's preferred method of contact• types of information that client wishes to receive. |
| <i>Personnel</i> must include at least one of the following: | <ul style="list-style-type: none">• colleagues• manufacturers• staff and employee representatives• supervisors• suppliers. |

Unit Mapping Information

CPPCMN4004B Facilitate effective client relationships

Links

Companion Volume implementation guides are found in VETNet - <https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6f3f9672-30e8-4835-b348-205dfcf13d9b>

Assessment Requirements for CPPCMN4004 Develop and manage client relations

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Performance Evidence

A person demonstrating competency in this unit must satisfy the requirements of the elements, performance criteria, foundation skills and range of conditions of this unit.

The person must also develop and manage business relationships with three new clients and respond to two client requests.

In doing the above work, the person must:

- identify each client's needs
- explain key features and benefits of company's products and services
- present verbal and written information on products and services to each client.

Knowledge Evidence

A person demonstrating competency in this unit must demonstrate knowledge of:

- processes to identify, establish and maintain business contacts and networks
- company requirements, including:
 - client confidentiality provisions
 - code of ethics
 - company image
- legislative and regulatory requirements relating to the work or service function, including:
 - codes of conduct
 - consumer law
 - environmental law
 - privacy legislation
 - quality and continuous improvement systems, standards and guidelines
- range of products and services available to business contacts
- benefits of maintaining good client communication when delivering customer service
- role of designated personnel in developing and managing client relations.

Assessment Conditions

The following must be present and available to learners during assessment activities:

- equipment:
 - computer with internet access
- materials:
 - company policies and procedures relating to client relations
 - legislation and regulatory information relating to job role
- contingencies:
 - two client requests
- specifications:
 - company product and service specifications
- relationship with client:
 - client consultation.

Timeframe:

- according to workplace requirements.

Assessor requirements

As a minimum, assessors must satisfy the assessor requirements in the Standards for Registered Training Organisations (RTOs) current at the time of assessment.

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