



Australian Government

CPPDSM3019 Communicate with clients in the property industry

Release: 1

CPPDSM3019 Communicate with clients in the property industry

Modification History

Release 1.

Replaces superseded equivalent CPPDSM3019B Communicate with clients as part of agency operations.

This version first released with CPP Property Services Training Package Version 5.

Application

This unit of competency specifies the outcomes required to interact and build relationships with clients in the property industry. It includes developing rapport with clients, handling initial client enquiries, establishing and maintaining a client database, and dealing with client complaints and problems.

The unit supports the work of a range of property industry professionals, including licensed real estate agents, real estate representatives and support staff, stock and station agents, and strata managers, in interacting and building effective relationships with clients as part of agency or organisation operations.

Licensing, legislative, regulatory or certification requirements apply to this unit in some States and Territories. Relevant state and territory regulatory authorities should be consulted to confirm those requirements.

Pre-requisite Unit

Nil

Competency Field

Strata community management

Unit Sector

Property services

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 contact with clients and determine their | 1.1. Contact with client is established and an interest in <i>client needs, preferences and requirements</i> is expressed to enhance client commitment and trust, and credibility of |
|---|---|

- needs. agency or organisation, and build return client base.
- 1.2. **Professional ethics** are maintained with client to promote agency image and credibility.
2. Handle initial client enquiries.
- 2.1. Client needs, preferences and requirements are accurately clarified to maximise opportunities to promote agency or organisation services.
- 2.2. Client is given space and time to evaluate agency or organisation services, while time is used to maximum advantage for client and agency or organisation.
- 2.3. Client is provided with accurate initial information on agency or organisation services.
- 2.4. Features and benefits of agency or organisation services are explained to client.
- 2.5. Interview appointment time is arranged where necessary and interview preparations are completed.
- 2.6. Formal and informal information is gathered and appropriate notes are taken for file.
3. Maintain and use client database.
- 3.1. Client database is accurately developed, regularly maintained and securely stored, while maintaining client confidentiality.
- 3.2. Regular clients are accurately identified and followed up.
- 3.3. Client records are accurately used to advise clients on agency or organisation services of possible interest.
4. Deal with client complaints and problems.
- 4.1. Client complaints and problems are acknowledged and client is supported to produce a positive outcome.
- 4.2. Client is encouraged to verbalise issues and active listening is used to minimise client frustration.
- 4.3. Client's confidence in agency or organisation is developed to promote long-term commitment and trust.
- 4.4. Mutually acceptable resolution of complaint or problem is achieved by implementing agency or organisation's policies and procedures.

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.

Skill	Performance feature
Learning skills to:	identify and use reliable sources of information on ways of enhancing client service strategies.
Numeracy skills to:	interpret routine numerical and graphical client information derived from client database.
Oral communication skills to:	ask questions to clarify procedures for dealing with client enquiries and complaints.
Reading skills to:	read and interpret client profiles to gather routine information on client needs and previous use of agency or organisation's services.
Writing skills to:	prepare notes and summaries of client needs, preferences and requirements in relation to services offered by agency or organisation.
Technology skills to:	use business technologies to access information from client databases and conduct online searches to gather routine information on clients while paying due regard to confidentiality and privacy.

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.

<i>Client needs, preferences and requirements</i> must include:	- agency or organisation services in relation to specific property - contract administration - current and planned developments - service, repair and maintenance of building facilities.
<i>Professional ethics</i> must include:	- acting in the interests of client - code of conduct - confidentiality - disclosure of conflicts of interest - due care - honesty - integrity - privacy - professional behaviour

- professional competence.

Unit Mapping Information

CPPDSM3019B Communicate with clients as part of agency operations

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 CPPDSM3019 Communicate with clients in the property industry

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Performance Evidence

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

The person must also interact and build relationships with clients as part of agency or organisation operations.

The person must demonstrate this performance by responding to each of the following routine workplace situations in the property industry:

- dealing with an initial enquiry from a potential new client about services offered by agency or organisation
- responding to a specific request from an existing client of agency or organisation
- responding to a customer complaint about the quality of service provided by agency or organisation.

In doing the above, the person must:

- apply agency or organisational policies and procedures, and relevant legislative requirements in regard to dealing with clients
- apply knowledge of agency or organisational services to enhance client support
- develop client commitment to agency or organisation and build return custom by establishing rapport and a relationship with client, maintaining professional ethics, and accurately discerning client needs, preferences and requirements
- establish and maintain client records and details, maintain client confidentiality, ensure secure storage of client records, and use client records to maximise client interest in agency or organisation's services
- resolve client complaints by acknowledging problems, supporting client in arriving at positive outcomes, and obtaining mutually acceptable complaint resolution
- use effective questioning, listening and observation skills to accurately determine client requirements.

Knowledge Evidence

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

- agency or organisation's record-keeping requirements
- client service goals and objectives
- services, including:
 - features and benefits
 - types
- client complaints and problems, including:
 - strategies for resolving conflicts
 - types
- client database with contact information
- client needs, preferences and requirements specific to own work role
- effective communication principles, including principles of and barriers to effective communication
- ethical standards, including:
 - acting in the interests of client
 - confidentiality
 - disclosure of conflict of interest
 - due care
 - honesty
 - integrity
 - privacy
 - professional behaviour
 - professional competence
- work organisation techniques and procedures, including:
 - prioritising workload to deal effectively with clients and enquiries
 - preparing timely and sufficient information
 - timing and scheduling of appointments.

Assessment Conditions

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

- equipment:
 - computer system with internet access and printer
- specifications:
 - agency or organisation policies and procedures for interacting and communicating with clients, including for resolving disputes
 - client database
 - details of services offered by agency or organisation
 - codes, standards and regulations relating to client service in the property industry
- relationships with team members and supervisor:
 - member of a work team in a property industry context under supervision of the manager or workplace principal.

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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