



Australian Government

Department of Education, Employment and Workplace Relations

CPPCMN4004B Facilitate effective client relationships

Release: 1

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Modification History

Not Applicable

Unit Descriptor

Unit descriptor

This unit of competency specifies the outcomes required to establish complex business contacts and networks and manage these relationships in a flexible and effective manner. Complex business relationships are those that require exploring products and services with the client that could improve or enhance their operations. Therefore this unit requires the individual to be familiar with a wide range of organisational products and services.

This unit would usually be carried out under supervision, within organisational guidelines.

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

Application of the Unit

Application of the unit

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

Licensing/Regulatory Information

Refer to Unit Descriptor

Pre-Requisites

Prerequisite units Nil

Employability Skills Information

Employability skills This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.

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.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify and monitor client needs.	1.1 <i>Client needs</i> and expectations are regularly discussed with <i>client</i> according to <i>company requirements</i>. 1.2 Feedback on company performance and level of client satisfaction is sought according to company requirements. 1.3 Prompt action is taken on feedback received from client, according to company requirements. 1.4 Contracts or variations to contracts or levels of agreed service provision are reviewed and implemented according to company requirements.
2. Respond to complex client needs.	2.1 Possibilities for meeting client needs are explained to client according to company requirements. 2.2 Clients are assisted to evaluate product and service options to satisfy their needs according to company requirements. 2.3 Preferred action is determined and prioritised according to company requirements. 2.4 Potential difficulties in client service delivery are identified and appropriate actions are taken according to company requirements.
3. Establish business contacts and networks.	3.1 Organisations and groups that have potential to benefit from company products and services are identified according to company requirements. 3.2 Appropriate individuals in group or organisation are identified in order to establish effective relationships according to company requirements. 3.3 Methods of <i>communication</i> with <i>business contacts and networks</i> are agreed on and maintained according to own level of responsibility and company requirements. 3.4 Trust and confidence of business contacts and networks are gained and maintained through demonstration of high standards of business practices and effective communication methods, according to company requirements.
4. Work effectively with business contacts.	4.1 Roles and responsibilities of business contacts are defined, clarified and agreed according to company requirements. 4.2 Realistic service commitments are set and adhered to according to company requirements. 4.3 Flexibility in normal work practices is adopted and encouraged, according to company requirements, when

ELEMENT	PERFORMANCE CRITERIA
	operating under unusual or difficult situations.
	4.4 Situations outside own area or level of responsibility are identified and where appropriate referred to appropriate personnel according to company requirements.
5. Promote company.	5.1 Strategies to represent and promote company's interests and requirements are developed.
	5.2 Additional products, services and information are suggested for consideration to meet client needs according to company requirements.
	5.3 Work group members are encouraged to develop effective relationships with client and users of client facilities.
6. Communicate advice and pricing information.	6.1 Written and verbal responses are presented according to company requirements.
	6.2 Pricing information for routine and specified products and services is provided where these match client needs, according to company requirements.
	6.3 Client requirements for follow-up information are attended to promptly according to company requirements.
	6.4 Bookings with client are scheduled and confirmed according to company requirements.

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

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

Required skills

- customer service skills to:
 - establish rapport with clients
 - gain clients' trust
 - interpret and meet client needs
- interpersonal skills to:
 - demonstrate empathy and tact
 - negotiate variations in client needs
 - relate to people from diverse backgrounds
- language, literacy and numeracy skills for:

REQUIRED SKILLS AND KNOWLEDGE

- communicating clearly and concisely verbally and in writing
- accessing, synthesising and using information
- completing and interpreting business documentation
- presenting information on products and services
- providing accurate pricing estimates and quotations
- planning and organising skills to manage time
- problem-solving skills to:
 - assess client needs
 - identify appropriate service or product
- technology skills to complete business documentation

Required knowledge

- business contacts and networks, including:
 - identifying potential contacts and networks
 - establishing and maintaining networks
- client confidentiality provisions
- legislation, regulations, codes of practice and industry advisory standards that apply to client relationships
- principles of time management
- range of products, services and commitments available to business contacts
- relevance of client service, good communication and own role in delivering customer service
- role of designated personnel in client referrals

Evidence Guide

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 This unit of competency could be assessed by observing client management, where a range of products and services are promoted and negotiated.

Critical aspects for assessment and evidence required to demonstrate competency in this unit A person who demonstrates competency in this unit must be able to provide evidence of the required skills and knowledge specified in this unit.

In particular the person should demonstrate the ability to:

- build client relationships
- explain features and benefits of products and services using knowledge of products and services
- identify and use opportunities for establishing business contacts and networks
- present information in a variety of formats to a range of business contacts.

Context of and specific resources for assessment Assessment of essential underpinning knowledge may be conducted in an off-site context. It is to comply with relevant regulatory or Australian standards' requirements.

Resource implications for assessment include access to:

- assessment documentation forms and record books
- products and information used in the provision of promoting company services
- suitable work area, or a simulated workplace environment, that allows for observation of client and candidate interaction.

Method of assessment Assessment methods must:

- satisfy the endorsed Assessment Guidelines of the Property Services Training Package
- include direct observation of tasks in real or simulated work conditions, with questioning to confirm the ability to consistently identify and correctly interpret the essential underpinning knowledge required for practical application
- reinforce the integration of employability skills with workplace tasks and job roles
- confirm that competency is verified and able to be

transferred to other circumstances and environments.

This unit could be assessed on its own or in combination with other units relevant to the job function.

Guidance information for assessment

Reasonable adjustments for people with disabilities must be made to assessment processes where required. This could include access to modified equipment and other physical resources, and the provision of appropriate assessment support.

Assessment processes and techniques should as far as is practical take into account the language, literacy and numeracy capacity of the candidate in relation to the competency being assessed.

Range Statement

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.

Client needs may relate to:

- advice or general information
- domestic, commercial or industrial interests
- hours of operation
- making complaints and suggestions
- purchasing products and services
- specific requests for information, including those relating to economic, social and environmental sustainability.

Clients may include:

- people with routine or special requests
- people from diverse social or cultural backgrounds
- regular and new clients, including:
 - business enterprises
 - government agencies
 - suppliers.

Company requirements may include:

- code of ethics
- company image
- legal and organisational policies and guidelines

- legislative and regulatory requirements relevant to the work or service function, including:
 - anti-discrimination and equal employment opportunity
 - codes of conduct
 - consumer law
 - environmental law
 - harassment and other laws specific to local government
 - OHS
 - privacy legislation
- OHS policies, procedures and programs
- policies and procedures relating to own role, responsibility and delegation
- quality and continuous improvement systems, standards and guidelines
- staff appearance and presentation.

Communication may include:

- communications book
- company presentations
- correspondence
- email
- exchange of reports and information
- inspections by client
- personal visits
- site news sheet
- telephone discussions.

Business contacts and networks may include the following groups and individuals:

- community groups
- departments or branches of the organisation
- organisations with industry links
- organisations with similar industry functions
- potential and current clients
- staff and employee organisations
- suppliers and manufacturers
- technicians.

Appropriate personnel may include:

- colleagues
- staff and employee representatives
- supervisors and line managers
- suppliers and manufacturers.

Information may be:

- communicated electronically, such as by email
- contained in:
 - company databases

- manufacturer specifications and information
 - products or services available, including features and benefits
 - provided verbally
 - quotations or pricing estimates
 - provided in writing, such as product brochures.
- Work group** members may include:
- colleagues
 - line managers
 - supervisors.
- Written and verbal responses** may include:
- general advice
 - information on products or services available, including features and benefits
 - quotations or pricing estimates
 - standard industry disclaimers.
- Products and services** and information relating to their pricing may include:
- introductory offers
 - value analysis, citing benefits provided
 - volume or repeat business pricing.

Unit Sector(s)

Unit sector Common

Competency field

Competency field