



Australian Government

Department of Education, Employment and Workplace Relations

CPPDSM5020A Manage and monitor effective client service in the real estate industry

Release: 1

CPPDSM5020A Manage and monitor effective client service in the real estate industry

Modification History

Not Applicable

Unit Descriptor

Unit descriptor

This unit of competency specifies the outcomes required to establish systems and processes for managing and monitoring client service within an agency environment. It includes developing client loyalty strategies, maintaining clear lines of communication with clients and reviewing the agency's client service policy. The unit may form part of the licensing requirements for persons engaged in real estate activities in those States and Territories where these are regulated activities.

Application of the Unit

Application of the unit

This unit of competency supports the work of those involved in managing and monitoring client service strategies within an agency environment.

Licensing/Regulatory Information

Refer to Unit Descriptor

Pre-Requisites

Prerequisite units Nil

Employability Skills Information

Employability skills The required outcomes described in this unit of competency contain applicable facets of employability skills. The Employability Skills Summary of the qualification in which this unit of competency is packaged, will assist in identifying employability skills requirements.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.

Performance criteria describe the required performance needed to demonstrate achievement of the element. Where ***bold italicised*** text is used, further information is detailed in the required skills and knowledge and/or the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1 Develop client loyalty strategies.	1.1 Client loyalty strategies are developed that foster repeat business and are consistent with ethical and legislative requirements. 1.2 Agency services are structured to emphasise client satisfaction and maintain the agency's reputation for service in the marketplace. 1.3 Client service strategies are integrated into individual and team delivery of agency services. 1.4 Performance indicators are developed that enable policy review and activity adjustment to occur.
2 Maintain clear lines of communication with clients.	2.1 Information is provided to clients that is timely, relevant, up-to-date and consistent with ethical and legislative requirements. 2.2 Information on client needs is provided in a manner that improves client relations and the quality of agency services. 2.3 Client service records are maintained to provide an accurate and objective record of communication with clients and other service providers. 2.4 Complaints are handled in a manner that improves the agency's reputation for quality service and is line with ethical and legislative requirements.
3 Review client policy.	3.1 Client satisfaction is surveyed at regular intervals to enable modification or adjustment to client contact and agency marketing activities. 3.2 Client feedback on the quality of agency services is gathered and used to improve performance in client contact areas. 3.3 Reviewed and updated information on agency services is maintained that reflects current client expectations and enables improvement of the agency's image. 3.4 Information provided by clients is used to update the agency marketing strategy in line with agency, ethical and legislative requirements.

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the essential skills and knowledge and their level, required for this unit.

REQUIRED SKILLS AND KNOWLEDGE

Required skills:

- ability to communicate with and relate to a range of people from diverse social, economic and cultural backgrounds and with varying physical and mental abilities
- analytical skills to interpret feedback from clients
- application of risk management strategies associated with implementation of client service strategies
- client service skills to determine client needs, enhance client commitment, trust and credibility of agency and to build return client base
- computing skills to access agency databases, send and receive emails and complete standard forms online
- decision making and problem solving skills to analyse situations and make decisions aimed at improving client service
- literacy skills to access and interpret a variety of texts, including customer feedback; prepare general information, papers, formal and informal letters, reports and applications; and complete standard and statutory forms
- planning, organising and scheduling skills to collect, collate and process client feedback
- research skills to identify and locate documents and information relating to client care and client service standards.

Required knowledge and understanding:

- barriers to effective communication
- client loyalty strategies
- client service strategies and standards
- communication process, strategies and techniques
- ethical standards
- relevant federal, and state or territory legislation and local government regulations relating to:
 - anti-discrimination and equal employment opportunity
 - consumer protection, fair trading and trade practices
 - employment and industrial relations
 - environmental issues
 - financial services
 - industrial relations
 - leases and tenancy agreements
 - OHS
 - privacy
 - property sales and management
 - taxation
- risks and risk management strategies.

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, the range statement and the Assessment Guidelines for this Training Package.

Overview of assessment

This unit of competency could be assessed through case studies, demonstrations and practical exercises focused on managing and monitoring client service to support the attainment of key agency business goals. Targeted written (including alternative formats where necessary) or verbal questioning to assess the candidate's underpinning knowledge would provide additional supporting evidence of competence. The demonstration and questioning would include collecting evidence of the candidate's knowledge and application of ethical standards and relevant federal, and state or territory legislation and regulations. This assessment may be carried out in a simulated or workplace environment. Assessment may be carried out in a simulated or workplace environment.

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:

- knowledge of the ethical and legislative requirements affecting the provision of effective client service in an agency context
- developing client loyalty strategies in an agency context
- maintaining clear lines of communication with clients in an agency context
- reviewing client policy in an agency context.

Context of and specific resources for assessment

Resource implications for assessment include:

- access to suitable simulated or real opportunities and resources to demonstrate competence
- assessment instruments that may include personal planner and assessment record book
- access to a registered provider of assessment services.

Where applicable, physical resources should include equipment modified for people with disabilities.

Access must be provided to appropriate learning and/or assessment support when required.

Assessment processes and techniques must be culturally appropriate, and appropriate to the language and literacy

capacity of the candidate and the work being performed.

Validity and sufficiency of evidence require that:

- competency will need to be demonstrated over a period of time reflecting the scope of the role and the practical requirements of the workplace
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the person's competence
- all assessment that is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through simulated project-based activity and must include evidence relating to each of the elements in this unit.

In all cases where practical assessment is used it will be combined with targeted questioning to assess the underpinning knowledge. Questioning will be undertaken in such a manner as is appropriate to the language and literacy levels of the candidate and any cultural issues that may affect responses to the questions, and will reflect the requirements of the competency and the work being performed.

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 in the performance criteria is detailed below. Add any 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.

Clients may include:

- body corporate managers
- buyer's agents
- buyers
- owners
- people from a range of social, cultural or ethnic backgrounds and with varying physical and mental abilities
- property developers
- regular and new customers
- sellers
- tenant's agents
- tenants.

Client loyalty strategies may refer to:

- costs
- meeting legal and ethical requirements
- specific activities, including:
 - client reward schemes
 - cross-selling
 - formal letters of thanks
 - handwritten notes thanking clients
 - online activities
 - phone calls thanking clients for business
 - promotional items
 - up-selling
- service
- success measures
- targets and timeframes
- value for money.

Ethical requirements may include:

- confidentiality
- honesty
- positive statements
- privacy.

- Legislative requirements*** may include:
- anti-discrimination and equal employment opportunity
 - consumer protection, fair trading and trade practices
 - environmental issues
 - financial services
 - industrial relations
 - leases and tenancy agreements
 - OHS
 - privacy
 - property sales and management
 - taxation
 - workplace and industrial relations.
- Agency services*** may include:
- contract administration
 - current and planned real estate developments
 - information on specific properties
 - property management
 - property sales.
- Performance indicators*** may include:
- qualitative indicators
 - quantitative indicators.
- Client service records*** may include:
- computerised
 - manual.

Unit Sector(s)

Unit sector Property development, sales and management

Competency field

Competency field Real estate