



**Australian Government**

# **CPPSIS4023A Facilitate effective spatial client relationships**

**Release 1**

## **CPPSIS4023A Facilitate effective spatial client relationships**

### **Modification History**

Unit revised and not equivalent to CPPSIS4003A Facilitate effective spatial client relationships

Element structure, and performance criteria, reviewed to reflect workplace requirements  
Skills and knowledge requirements and the range statement updated

### **Unit Descriptor**

This unit of competency specifies the outcomes required to assess client needs and provide appropriate information and follow-up on a variety of issues within the spatial information handling framework. It requires the ability to communicate effectively and apply skills and knowledge to a wide variety of spatial contexts, including complex issues relating to organisational products and services. Functions would be carried out under limited supervision and within organisational guidelines.

### **Application of the Unit**

This unit of competency supports the application of communication, interpersonal, teamwork, self-management and basic problem-solving skills. The skills and knowledge acquired upon completion of this unit would apply to the needs of employees in supporting positions for surveying, town planning, cartography, mapping and geographic information systems (GIS).

### **Licensing/Regulatory Information**

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

### **Pre-Requisites**

Nil

### **Employability Skills Information**

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 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

- |   |                                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|---|-------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 | Identify nature and type of spatial service required. | <p>1.1 Discussion with <b><i>client</i></b> regarding <b><i>client needs</i></b> and expectations is conducted in line with <b><i>organisational guidelines</i></b>.</p> <p>1.2 Client expectations are ascertained to establish an understanding of <b><i>spatial service requirements</i></b>.</p> <p>1.3 Feedback is sought from client confirming understanding of spatial requirement.</p> <p>1.4 Prompt action is taken to address the enquiry.</p> <p>1.5 Relevant personnel are consulted on possibility of contractual activity or on the need for a variation to contractual activity.</p> <p>1.6 Contracts are implemented according to <b><i>company requirements</i></b>.</p> |
| 2 | Satisfy client needs.                                 | <p>2.1 Clients are encouraged and assisted to evaluate <b><i>spatial product and service options</i></b> to satisfy their needs according to company requirements.</p> <p>2.2 Areas of difficulty are identified and preferred action is prioritised according to organisational guidelines.</p>                                                                                                                                                                                                                                                                                                                                                                                           |
| 3 | Establish business contacts and networks.             | <p>3.1 Organisations and groups that have the potential to benefit from company products and services are identified.</p> <p>3.2 Appropriate contact officers in the organisations identified are contacted according to organisational</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                |

- guidelines.
- 3.3 Methods of **communication** and high business standards are maintained with **business contacts and networks** according to organisational guidelines.
  - 3.4 Strategies to represent and promote the company's interests and requirements are developed.
- 4 Work effectively with business contacts.
- 4.1 Realistic service commitments are set and adhered to according to organisational guidelines.
  - 4.2 Flexibility in work practices when operating under unusual or **complex spatial requirements** is encouraged.
  - 4.3 Situations outside own area of responsibility are referred to **appropriate personnel** according to organisational guidelines.
  - 4.4 **OHS** issues form part of the business advice, where appropriate.
- 5 Communicate advice and pricing information.
- 5.1 **Written or verbal responses** are provided according to organisational guidelines.
  - 5.2 Pricing information for routine specified products and services are provided according to organisational guidelines.
  - 5.3 Client requirements for follow-up information are attended to promptly.
  - 5.4 Co-workers and supervisors are promptly advised of work implications.
  - 5.5 **Spatial business documentation** is completed according to **work procedures**.

## Required Skills and Knowledge

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

### Required skills

- communication skills that assist in facilitating client relationships, including:
  - accessing, synthesising and using information
  - telephone and electronic contact
  - displaying empathy, tact and diplomacy
  - negotiating
  - written skills to document follow-up action
- computer skills to complete business documentation
- interpersonal skills e.g. cooperation and flexibility
- literacy skills to:
  - assess and use workplace information
  - interpret procedural requirements
  - process workplace documentation
  - read and record data and write routine reports
  - research and access routine sources of spatial data
- numeracy skills to:
  - estimate pricing
  - provide quotations
  - record and interpret statistics with accuracy and precision
  - undertake computations
- organisational skills to:
  - prepare and administer documentation
  - prioritise activities to meet contractual requirements
- spatial skills to:
  - archive and retrieve spatial data
  - manage files

### Required knowledge

- complaint-handling procedures
- industry ethics and practice relating to surveying spatial products and services
- internal and external client groups
- methods of establishing and maintaining effective business contacts and networks
- organisational customer service standards

- principles of time management
- product and service knowledge, including pricing schedules
- role of designated personnel in client referrals
- range of potential and actual business contacts and networks
- safe work practices
- sales presentation processes
- work allocation procedures

## 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.

|                                                                                                     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|-----------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Overview of assessment</b>                                                                       | This unit of competency could be assessed on its own or in combination with other units relevant to the job function, for example CPPSIS4033A Participate in spatial process improvement.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Critical aspects for assessment and evidence required to demonstrate competency in this unit</b> | <p>A person who demonstrates competency in this unit must be able to provide evidence of:</p> <ul style="list-style-type: none"><li>• applying cost considerations</li><li>• assessing and acting upon contingencies</li><li>• determining precise data requirements</li><li>• identifying and using opportunities for establishing business contacts and networks</li><li>• knowledge of available products and services and the capacity to explain to clients their features and benefits</li><li>• presenting information in a variety of formats to a range of business contacts</li><li>• proactive client relationship-building skills.</li></ul>                         |
| <b>Specific resources for assessment</b>                                                            | <p>Resource implications for assessment include access to:</p> <ul style="list-style-type: none"><li>• assessment instruments, including personal planner and assessment record book</li><li>• assignment instructions, work plans and schedules, policy documents and duty statements</li><li>• registered training provider of assessment services</li><li>• relevant guidelines, regulations and codes of practice</li><li>• suitable venue and equipment.</li></ul> <p>Access must be provided to appropriate learning and assessment support when required.</p> <p>Where applicable, physical resources should include equipment modified for people with disabilities.</p> |
| <b>Context of assessment</b>                                                                        | Holistic: based on the performance criteria, evidence guide, range statement, and required skills and knowledge.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Method of assessment</b>                                                                         | <p>Demonstrated over a period of time and observed by the assessor (or assessment team working together to conduct the assessment).</p> <p>Demonstrated competency in a range of situations, that may include customer/workplace interruptions and involvement in related activities normally experienced in</p>                                                                                                                                                                                                                                                                                                                                                                 |

the workplace.

Obtained by observing activities in the field and reviewing induction information. If this is not practicable, observation in realistic simulated environments may be substituted.

**Guidance information for assessment**

Assessment requires that the clients' objectives and industry expectations are met. If the clients' objectives are narrowly defined or not representative of industry needs, it may be necessary to refer to portfolio case studies of a variety of surveying and spatial information services requirements to assess competency.

Oral questioning or written assessment and hypothetical situations (scenarios) may be used to assess underpinning knowledge (in assessment situations where the candidate is offered a preference between oral questioning or written assessment, questions are to be identical).

Supplementary evidence may be obtained from relevant authenticated correspondence from existing supervisors, team leaders or specialist training staff.

All practical demonstration must adhere to the safety and environmental regulations relevant to each State or Territory.

Where assessment is for the purpose of recognition (recognition of current competencies [RCC] or recognition of prior learning [RPL]), the evidence provided will need to be authenticated and show that it represents competency demonstrated over a period of time.

In all cases where practical assessment is used it will be combined with targeted questioning to assess the underpinning knowledge.

Assessment processes will be 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**

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.

***Client*** may include:

- customers with routine or special requests
- external to organisation
- internal to organisation
- regular and new customers, including:
  - business enterprises

- government agencies
- members of the public
- suppliers.

**Client needs** may include:

- administrative
- advice or general information
- cartography
- commercial, government or industrial interests
- complaints and suggestions
- environmental services
- GIS
- locational information
- mapping information
- payment
- spatial software
- surveying.

**Organisational guidelines** may include:

- code of ethics
- company policy
- legislation relevant to the work or service function
- manuals
- OHS policies and procedures
- personnel practices and guidelines outlining work roles and responsibilities.

**Spatial service requirements** may include:

- administration (e.g. postcodes, suburbs, and federal and state electoral counties)
- analysis of environmental, land and geographic information
- asset management
- cartographic services
- civil engineering
- digital imagery
- electricity
- emergency services management
- environmental datasets
- GIS
- integrated services – environmental, land and geographic related datasets
- land ownership tenure system
- local government
- location-based services
- global positioning
- mapping facilities
- site analysis
- survey marks
- sewerage
- telecommunications

- town planning
- utility services, such as water.

***Company requirements***  
may include:

- company's promotional needs
- legal and organisational policies and guidelines
- legislative and regulatory requirements, including:
  - codes of conduct
  - consumer law
  - environmental law
- relevant state, territory or federal legislation that affects organisational operations, including:
  - anti-discrimination and diversity
  - industrial relations
  - OHS
  - privacy
- personnel practices and guidelines outlining work roles and responsibilities
- quality systems, standards and guidelines
- staff appearance and presentation.

***Spatial product and service options*** may include:

- database management system (e.g. DBMS)
- datum, including geocentric datum
- digital geographic information exchange standard (DIGEST)
- digital imagery
- digital nautical chart
- engineering surveying
- existing spatial datasets
- geocoding
- geodata products
- geodetic surveying
- GIS
- historical spatial data
- hydrographic surveying
- internet spatial data directories
- land information system
- map projections
- map referencing
- metadata
- mining surveying
- navigational tools, such as global navigation satellite system (GNSS) units
- remote sensing
- reports
- software
- topographic data

- topographic information
- tender documents.

- Communication** may be verbal and written and may include:
- presentation and correspondence on company profile
  - electronic
  - exchange of reports and information
  - inspections
  - logbooks
  - newsletters.
- Business contacts and networks** may include:
- community groups
  - departments or branches of an organisation
  - environmental groups
  - local, state or territory, and federal government
  - research companies
  - software vendors
  - suppliers
  - technicians.
- Complex spatial requirements** may include any requirement that:
- calls for diplomacy or discretion beyond operational activity
  - involves accessing information that is not immediately obvious or accessible
  - warrants the attention of particular personnel.
- Appropriate personnel** may include:
- colleagues
  - staff or employee representatives
  - supervisors or line managers
  - suppliers.
- OHS** may include:
- Australian standards
  - development of site safety plan
  - identification of potential hazards
  - inspection of work sites
  - training staff in OHS requirements
  - use of equipment and signage.
- Written or verbal responses** may include:
- electronic or paper-based formal correspondence
  - general advice
  - informal conversations or emails
  - information on available products, including features and benefits
  - pricing estimates and quotations
  - standard industry disclaimers.
- Spatial business documentation** may include:
- databases
  - detailed technical description of the spatial data and its qualifiers
  - emails and faxes
  - quotations and estimates
  - standard letters

- Work procedures** may be written and verbal and may include:
- tax invoices
  - statements.
  - assignment instructions
  - instructions from colleagues, supervisor or manager
  - personal protective equipment requirements
  - reporting and documentation requirements
  - specific client requirements.

## **Unit Sector(s)**

Surveying and spatial information services

## **Custom Content Section**

Not applicable.