



Australian Government

SIRWSLS004 Optimise customer and territory coverage

Release: 1

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Modification History

Not applicable.

Application

This unit describes the performance outcomes, skills and knowledge required to efficiently plan for and service business customers within a defined territory, and seek opportunities to improve territory coverage and service efficiency.

It applies to individuals working in frontline sales roles who work according to defined sales and service standards and objectives.

No occupational licensing, certification or specific legislative requirements apply to this unit at the time of publication.

Pre-requisite Unit

Nil

Competency Field

Sales

Unit Sector

Wholesale

Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	Performance criteria describe the performance needed to demonstrate achievement of the element.
1. Establish coverage plan.	1.1. Identify and source information required for development of coverage plan 1.2. Create and document coverage plan that meets business performance objectives and service standards. 1.3. Integrate strategies that ensure individual customer coverage in a timely and effective manner. 1.4. Implement procedures for field team to collect and report customer information and feedback.
2. Report on customer interactions.	2.1. Organise and make customer contact according to territory coverage plan.

- 2.2. Analyse and action customer feedback from a territory, or provide to relevant personnel for action.
 - 2.3. Prepare required documentation following each customer interaction.
 - 2.4. Collate documentation from interactions and store in a secure location.
 - 2.5. Prepare and submit documentation according to agreed timeframe, format and level of detail.
- 3. Improve coverage.
 - 3.1. Determine needs and expectations of business customers from feedback, sales data and ongoing customer contact.
 - 3.2. Assess current satisfaction levels with service and product.
 - 3.3. Initiate actions to improve business customer satisfaction levels.
 - 3.4. Identify and take opportunities to optimise coverage and promotional activity based on information gathered.

Foundation Skills

Foundation skills essential to performance are explicit in the performance criteria of this unit of competency.

Unit Mapping Information

No equivalent unit.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=ca051b1b-5101-4ec2-ac1c-49699303188d>

Assessment Requirements for SIRWSLS004 Optimise customer and territory coverage

Modification History

Not applicable.

Performance Evidence

Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:

- develop, implement and monitor one coverage plan
- conduct six different customer interactions according to the plan and document outcomes
- develop and report on strategies to improve coverage and outcomes for the nominated territory
- communicate effectively with business customers to capture accurate and relevant feedback for an assigned territory
- arrange one joint promotional activity to enhance business customer and end consumer satisfaction levels and attain sales targets.

Knowledge Evidence

Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:

- organisational policies and procedures for servicing customers and reporting requirements
- business performance objectives and how these relate to own sales role
- types of information for inclusion in a coverage plan
- factors for consideration in developing a coverage plan, including:
 - competitor activity
 - types of customers and their varying needs
 - customer demographics
 - sales strategies within territory
 - range of products and services for each customer within a territory
 - size and features of territory
 - geography
 - account customers
- types of customer feedback and how feedback can be used to improve performance.

Assessment Conditions

Skills must be demonstrated in a wholesale environment. This can be:

- an industry workplace

- a simulated industry environment.

Assessment must ensure access to:

- organisational policies and procedures for sales activities
- a business sale system
- organisational business plans and objectives
- customers with different requirements.

Assessors must satisfy the Standards for Registered Training Organisations' requirements for assessors.

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