



Australian Government

Department of Education, Employment and Workplace Relations

SIRWSLS003A Optimise customer and territory coverage

Revision Number: 1

SIRWSLS003A Optimise customer and territory coverage

Modification History

Not applicable.

Unit Descriptor

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

Application of the Unit

Application of the unit	This unit applies to frontline sales personnel. It requires frequent and effective communication with business customers to capture accurate and relevant feedback for an assigned territory, and identify and seize opportunities to improve territory coverage or service efficiency in accordance of defined sales and service standards and objectives.
--------------------------------	---

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	Nil
---------------------------	-----

Employability Skills Information

Employability skills

The required outcomes described in this unit contain applicable facets of employability skills. The Employability Skills Summary of the qualification in which this unit 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 | Establish coverage plan for a territory. | 1.1 | Ensure coverage plans meet business <i>performance objectives</i> and service standards. |
| | | 1.2 | Set <i>territory coverage plans</i> to ensure <i>customer</i> coverage in a timely and effective manner. |
| 2 | Report on business visits. | 2.1 | Complete business visits according to <i>territory</i> plan. |
| | | 2.2 | Establish procedures for field team to collect and report <i>customer information</i> and <i>feedback</i> . |
| | | 2.3 | Analyse and action <i>customer feedback</i> from a territory, or send to relevant territory or management personnel for action. |
| | | 2.4 | Prepare required <i>documentation</i> immediately after each business visit. |
| | | 2.5 | Collate documentation from business visits and keep in a secure location. |

ELEMENT**PERFORMANCE CRITERIA**

- | | | |
|---|---|--|
| | 2.6 | Prepare documentation and submit according to agreed timeframe, format and level of detail. |
| 3 | Improve customer or territory coverage. | |
| | 3.1 | Determine needs and expectations of business customers. |
| | 3.2 | Determine current satisfaction levels with service and product. |
| | 3.3 | Initiate actions to improve business customer satisfaction levels. |
| | 3.4 | Seize opportunities to optimise coverage of a territory . |
| | 3.5 | Seize opportunities to optimise coverage for a customer. |
| | 3.6 | Confirm opportunities for merchandising improvements or joint promotional activities with business customers and report to relevant supervisor. |

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

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

The following skills must be assessed as part of this unit:

- collecting, analysing and organising information to:
 - establish territory coverage plan
 - research information on which to base improvement of territory coverage
 - determine customer needs accurately
- personal task and priority planning
- time management
- verbal and non-verbal interpersonal communication skills
- literacy and numeracy skills to:
 - collect and report information and feedback
 - read and interpret information
 - document procedures for improving sales.

The following knowledge must be assessed as part of this unit:

- territory characteristics and features
- types of business customers
- range of products and services for each customer within a territory
- customer needs
- business policy and procedures for servicing customers
- competitor activity
- customer satisfaction levels
- relevant contact personnel in businesses
- merchandise and sales strategies within territory
- OHS aspects of job
- relevant commercial law and legislation.

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

EVIDENCE GUIDE

Guidelines for this Training Package.

Critical aspects for assessment and evidence required to demonstrate competency in this unit

Evidence of the following is essential:

- identifies and describes business performance objectives and service standards
- visits and communicates effectively with business customers to capture accurate and relevant feedback for an assigned territory as frequently as required
- prepares accurate and insightful reports on customer feedback and business visits according to agreed timelines, format and level of detail
- arranges joint promotional activities to enhance business customer and end consumer satisfaction levels and attain sales targets
- identifies and seizes opportunities to improve territory coverage or service efficiency
- completes all tasks in a satisfactory and timely manner, and in consideration of sales and service standards and objectives.

Context of and specific resources for assessment

Assessment must ensure access to:

- a wholesale work environment
- relevant documentation, such as:
 - business policy and procedures
 - business plans and objectives
- a range of business customers with different requirements
- appropriate business technology.

EVIDENCE GUIDE

Methods of assessment

A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:

- observation of performance in the workplace
- third-party reports from a supervisor
- customer feedback
- review of portfolio of evidence
- written or verbal questioning to assess knowledge and understanding.

Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Assessing employability skills

Employability skills are integral to effective performance in the workplace and are broadly consistent across industry sectors. How these skills are applied varies between occupations and qualifications due to the different work functions and contexts.

Employability skills embedded in this unit should be assessed holistically in the context of the job role and with other relevant units that make up the skill set or qualification.

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.

RANGE STATEMENT

General contexts may include

- types of products and services provided
- business policy and procedures with regard to acquisition and sale of products and services
- size, type and location of business
- business merchandise range
- strategic measurement and evaluation systems and processes
- characteristics of the specific products or services
- management structure and communication relationships
- business service range
- customers, including other businesses or end consumers serviced through business customers or directly
- varying levels of staff training
- worksite-specific context, variations and environments.

Performance objectives may include:

- market share
- positioning with local businesses
- price
- quality
- volume of sales
- presentation or merchandising of products or services
- customer retention
- shift in sales demographics.

Territory coverage plans may take into account:

- relevant business policy and procedures
- relevant legislation and statutory requirements
- types of products and services provided
- size, type and location of business
- business merchandise range
- characteristics of the specific products or services
- customer demographics
- customer confidence and expectations.

RANGE STATEMENT

Customers may include:

- business customers or individuals
- new or repeat contacts
- external and internal contacts
- customers with routine or special requests
- people from a range of social, cultural and ethnic backgrounds and with varying physical and mental abilities.

Territory may be defined by:

- size, type and location of stores
- demographic parameters
- territory size, location and geographic spread
- account customers.

Customer information may include:

- name and contact details
- transaction records
- needs and preferences
- details of items bought or returned.

Feedback may be sought and given:

- verbally
- in writing
- in groups
- individually.

Customer feedback information may include:

- competitor activities
- pricing
- satisfaction levels
- needs, preferences and requests
- product turnover
- recalls
- product problems
- display disputes
- end consumer complaints.

RANGE STATEMENT

Documentation may relate to:

- shelf management
- missing tickets
- missing lines.

Promotional activities may include:

- manufacturer product or service campaigns
- loyalty programs
- seasonal campaigns
- events
- sales discounts
- special displays
- gift merchandise and promotional materials
- staff uniforms, badges, hats, etc.
- advertising materials.

Unit Sector(s)

Sector

Wholesale

Competency field

Competency field

Sales