



Australian Government

Department of Education, Employment and Workplace Relations

SIRWSLS004A Process product and service data

Revision Number: 1

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Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to maintain and process wholesale sales, customer service and related product data using the existing business technology and systems.
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Application of the Unit

Application of the unit	This unit requires sales and administrative staff to utilise business technology and systems to maintain an accurate product database to evaluate and forecast customer preferences and product or service performance according to business policy and procedures.
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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	Nil
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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 Process product and service data. | 1.1 Source and report <i>product and service data</i> using <i>business technology and systems</i> . |
| | 1.2 Store, retrieve and relay <i>data</i> according to business technology, information management systems and procedures. |
| | 1.3 Process product and service data according to confidentiality, security and systems access requirements. |
| 2 Monitor customer sales. | 2.1 Monitor product mix for each <i>customer</i> to identify potential add-on sales. |
| | 2.2 Monitor customer sales figures to identify success of current <i>sales and supply targets</i> . |
| | 2.3 Enter information affecting future forecasts into the database in an accurate and timely manner. |

ELEMENT	PERFORMANCE CRITERIA
3 Maintain product database.	3.1 Maintain accurate and current details of products and services in product database, including deleting old items and inserting new items. 3.2 Collect and correctly process latest data. 3.3 Apply security procedures for access to database. 3.4 Build and maintain data records to according to business policy and procedures. 3.5 Collect information for reporting purposes using appropriate technology to convey product or service information. 3.6 Generate reports to business requirements.
4 Determine customer preferences.	4.1 Evaluate volume of products purchased by individual customers to anticipate future requirements and preferences. 4.2 Provide timely and accurate reports on information that can enhance decision making on provision of products and services to customers.

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:

- using business technology and systems to:
 - input and process product and service data
 - retrieve and utilise data appropriately
 - maintain product databases
 - monitor customer preferences, sales and develop sales and supply targets
 - generate reports to business requirements
- applying security procedures for business technology and systems
- collecting and organising information
- analysing and evaluating information
- time management
- literacy and numeracy skills to:
 - perform data entry
 - read and interpret a range of written material
 - interpret sales data
 - produce reports.

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

- range of customers and product and services offered
- types of data
- data processing requirements
- storage and security of data and hardware or records systems
- use and maintenance of business technology and systems
- business policy and procedures in regard to:
 - supply and distribution of products or services
 - reporting mechanisms
 - use and maintenance of customer and sales data
 - data security and privacy
 - evaluation of product and service performance.
- factors determining customer preferences
- OHS with relation to use of computer equipment.

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.

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

Evidence of the following is essential:

- utilises business technology and systems to perform accurate data processing, storage and retrieval according to data and systems security requirements and business policy and procedures
- collects and organises information to maintain accurate and current details of products and services in product database
- utilises product database to perform accurate product or service performance evaluations and report accurate information on customer preferences across a range of customers and products or services according to business policy and procedures
- interprets customer preference and product or service performance information to forecast customer preferences and requirements.

Context of and specific resources for assessment

Assessment must ensure access to:

- a sales-oriented work environment
- relevant sources of product and service information
- relevant documentation, such as:
 - policy and procedures manuals
 - sales reports
 - business plans and objectives
- relevant business technology and systems.

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
- 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.

Product or service data may include:

- purchase requests and orders
- tender submissions and proposals
- invoices and payment requests
- statements and petty cash vouchers
- offer and contract documents
- evaluation documentation
- records of supplier performance
- financial statements

RANGE STATEMENT

Business technology and systems may include:

- records of conversation.
- portable data entry
- personal computers or terminals (stand-alone or networked)
- printers
- scanners
- numerical keyboard equipment, including calculators
- software, including:
 - word processing
 - databases
 - spreadsheets
 - financial
 - inventory
- electronic data interchange (EDI)
- point-of-sale terminals
- information management systems
- sales and distribution systems.

Data may be:

- public
- secure
- electronic
- hard copy
- verbal
- internal or external
- annual reports
- statistical reports

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.

RANGE STATEMENT

Sales and supply targets 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.

Details recorded in ***product database*** may include:

- dimensions and characteristics
- manufacturer or supplier
- packaging
- price (wholesale, retail, etc.)
- trends
- seasonal variations
- special events

Business policy and procedures may relate to:

- supply and distribution of products or services
- operating and maintaining business technology
- reporting mechanisms
- use and maintenance of customer and sales data
- data security and privacy
- evaluation of product and service performance.

Reports may be:

- written
- electronic
- verbal
- annual reports
- internal or external
- statistical reports.

Unit Sector(s)

Sector

Wholesale

Competency field

Competency field Sales