



Australian Government

Department of Education, Employment and Workplace Relations

SIRWSLS305 Optimise customer and territory coverage

Release: 1

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Modification History

The version details of this endorsed unit are in the table below. The latest information is at the top.

Release	Comments
First Release	This is a revised unit, based on and equivalent to SIRWSLS003A Optimise customer and territory coverage.

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.

The unit 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 according to defined sales and service standards and objectives.

Application of the Unit

This unit applies to frontline sales personnel.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification 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 and Performance Criteria

Element	Performance Criteria
Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.
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 coverage</i> 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. 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 and coverage for a customer. 3.5.Confirm opportunities for merchandising improvements or joint <i>promotional activities</i> with business customers and report to relevant supervisor.

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- collecting, analysing and organising skills to:
 - determine customer needs
 - establish territory coverage plan
 - research information on which to base improvement of territory coverage
- communication and interpersonal skills to:
 - negotiate with and persuade customers
 - sell to customers
- literacy and numeracy skills to:
 - collect and report information and feedback
 - document procedures for improving sales
 - read and interpret information
- planning and organising skills to plan personal tasks and priorities
- problem-solving skills to identify needs and optimise coverage
- time management skills to prepare and collate business visit documentation in a timely manner

Required knowledge

- business policy and procedures for servicing customers
- competitor activity
- customer needs
- customer satisfaction levels
- merchandise and sales strategies within territory
- relevant legislation and statutory requirements relating to the retail industry, including work health and safety (WHS)
- range of products and services for each customer within a territory
- relevant contact personnel in businesses
- territory characteristics and features
- types of business customers

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the 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 business-to-business sales 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.

Method 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
- customer feedback
- review of portfolios of evidence and third-party workplace reports of on-the-job performance
- written or verbal questioning to assess knowledge and understanding.

Guidance information for assessment

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

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, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the individual, accessibility of the item, and local industry and regional contexts) may also be included.

Performance objectives

may include:

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

Territory coverage plans

may take into account:

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

Customer may include:

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

Territory may be defined by:

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

Customer information

may include:

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

Feedback may be sought and given:

- in groups
- in writing
- individually
- verbally.

Customer feedback

- competitor activities

information may include:

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

Documentation may relate to:

Promotional activities may include:

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

Unit Sector(s)

Wholesale

Custom Content Section

Sales