



Australian Government

Department of Education, Employment and Workplace Relations

SIRXCCS305 Maintain business to business relationships

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 but not equivalent to SIRXCCS006A Maintain business to business relationships. Content and element added addressing functions to improve business customer outcomes and business relationships.

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to develop and maintain enduring relationships with business customers, focusing on identification of customer needs.

This unit covers the identification of key customer contacts and service-specific customer needs. It requires conformance with trading terms and the building of customer contacts to maintain sustainable business relationships.

Application of the Unit

This unit applies to sales team members who build a customer base and then service its needs.

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.

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| <p>1. Maintain close contact with business customers.</p> | <p>1.1. Confirm <i>relevant contact personnel</i> for each business or account customer.</p> <p>1.2. Participate and contribute to <i>team</i> efforts to service business customers.</p> <p>1.3. Build external relationships to improve <i>supply chain efficiency</i>.</p> <p>1.4. Maintain business customer contact consistent with <i>business policy and procedures</i>.</p> |
| <p>2. Identify business customer needs.</p> | <p>2.1. Confirm means to <i>identify</i> business customer needs.</p> <p>2.2. Consult relevant customer contacts to review business needs.</p> <p>2.3. Analyse current business and <i>promotional activities</i> and determine future directions.</p> <p>2.4. Outline and confirm <i>trading terms</i> for specific customers.</p> <p>2.5. Confirm pricing policy and procedures.</p> <p>2.6. Process business reviews using latest forecasts of current and future trends.</p> |
| <p>3. Improve business customer outcomes and business relationships.</p> | <p>3.1. Report, promote and advocate the needs of business customers and end consumers within the organisation.</p> <p>3.2. Establish and use quality assurance and compliance procedures to qualify and quantify business customer needs.</p> <p>3.3. Use judgement to guide the standards of quality required to meet business customer service needs and expectations.</p> <p>3.4. Anticipate future business customer needs and factor into management activities.</p> <p>3.5. Provide regular, effective and targeted feedback to business customers regarding the services and the value that is provided.</p> |

Required Skills and Knowledge

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

Required skills

- communication and interpersonal skills to facilitate:
 - building relationships with business customers
 - consultation
 - dispute resolution
 - negotiation
 - presentation
- literacy skills to read, analyse and interpret a range of business policy and procedures, documents and research information
- planning and organising skills to:
 - collect and organise information
 - prioritise work schedule
 - process business forecasts for implementation
 - review business needs and basic forecasts
- problem-solving skills to anticipate future business customer needs
- self-management skills to:
 - confirm trading terms, pricing policies and other relevant procedures to customers
 - demonstrate flexibility when communicating within teams and responding to customers
 - identify and maintain key contact personnel at customer businesses
- teamwork skills to contribute to team service to specific customers
- technology skills to use technology effectively

Required knowledge

- business policy and procedures for building relationships with business customers
- information sources on product and supply arrangements for customers
- relevant legislation and statutory requirements, including work health and safety (WHS)
- pricing policies
- trading terms

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:

- builds sustainable relationships with business customers that deliver agreed business outcomes
- identifies key contact personnel for businesses with a given territory or customer account
- describes and uses a range of means to identify specific needs of business customers
- confirms trading terms for customers according to business policy and procedures.

Context of and specific resources for assessment

Assessment must ensure access to:

- a business-to-business sales work environment
- relevant sources of product information
- relevant documentation, such as policy and procedures manuals
- forecasts for current and future market trends
- a range of business customers with different requirements
- an appropriate range of products or services
- customer information.

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
- third-party reports from a supervisor
- customer feedback
- 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.

Relevant contact personnel may include:	• 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.
Team members may include:	• full-time, part-time, casual or contract staff • people from a range of cultural, social and ethnic backgrounds • people with a range of responsibilities and job descriptions • people with varying degrees of language and literacy.
Supply chain efficiency may be influenced by factors, including:	• account management • effectiveness and timeliness of product or service supply • efficacy of supply arrangements and distribution systems • product management • quality, accuracy and timeliness of information provision and communications.
Business policy and procedures in relation to:	• client relationship management • interaction with customers • pricing arrangements • sale and distribution of products and services • trading terms.
Methods to identify business customer needs may include:	• appropriate questioning and active listening • observation • review of sales records • verbal or non-verbal communication with: • customer contacts • staff • supervisors and management • suppliers.
Promotional activities may include:	• advertising • catalogues • corporate or locally-based activities • dealing with advertising agencies and consultants • internal and external activities

Trading terms may be influenced by:

- internet
- newspapers
- posters
- radio or television
- suppliers
- website.
- continuous improvement
- due diligence requirements
- infrastructure and capital outlay requirements
- intellectual property and technology rights
- market position
- organisational systems integration and compatibility
- planning cycles and timing
- risk sharing
- supply chain management
- terms and conditions agreed
- value for money.

Unit Sector(s)

Cross-Sector

Competency Field

Client and Customer Service