



Australian Government

Department of Education, Employment and Workplace Relations

SIRXCCS408 Build retail relationships and sustain customer loyalty

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	New unit

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to monitor and analyse systems and data relating to customer behaviour and relationships; and to plan and implement improvements to systems, processes and strategies to build retail relationships and sustain customer loyalty. It also covers engaging staff in research activities and encouraging staff participation in the selection and implementation of improvements and new strategies.

Application of the Unit

This unit applies to area, store and department managers and team leaders responsible for building the customer base and developing relationships with customers. It is important that the manager engages the staff team and that the team works together to research and introduce processes and strategies that strengthen customer alignment with the brand and increase customers' purchasing behaviour.

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. Review customer relationship management systems.	1.1. Identify and communicate objectives of review of organisation's <i>customer relationship management</i> (CRM) systems and engage staff in the process. 1.2. Lead evaluation of organisation's customer relationship data collection and analysis procedures to assess contribution to current business needs. 1.3. Lead research into innovations in CRM systems and procedures and evaluation of applicability to organisational requirements. 1.4. Lead research and selection of <i>customer profiling data</i> that would assist the organisation in building a sustainable competitive advantage. 1.5. Consider and document proposals to enhance current organisational CRM capabilities and distribute to relevant personnel. 1.6. Contribute to the selection and <i>implementation</i> of proposals according to scope of role and responsibilities.
2. Monitor and analyse customer behaviour.	2.1. Identify and communicate objectives of analysis of customer behaviour and engage staff in the process. 2.2. Monitor customer relationship data collection to ensure enhanced CRM systems and procedures are implemented and provide value. 2.3. Lead a review of current customer relationships and loyalty levels and set targets for enhanced outcomes. 2.4. Lead research into customer demand for emerging products, services and strategies and evaluate applicability to business goals. 2.5. Analyse internal and external data to identify <i>trends in customer behaviour</i> and predict future preferences. 2.6. Consult on findings with staff team and other relevant personnel to identify trends and preferences to be addressed in the short and long term.
3. Select and plan	3.1. Identify and communicate objectives of <i>events, offers and</i>

ELEMENT**PERFORMANCE CRITERIA**

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| targeted events, offers and programs. | <p>programs and engage relevant staff in the selection and planning process.</p> <p>3.2. Lead a review of customer participation in, and response to, past events, offers and programs to identify improvements and new ideas.</p> <p>3.3. Lead a review of CRM and external customer behaviour data to identify potential relationship strengthening strategies for different customer target groups.</p> <p>3.4. Lead research into emerging strategies for building customer relationships and loyalty, and evaluate applicability to business goals.</p> <p>3.5. Consult with staff team and other relevant personnel to select cost-effective events, offers and programs for implementation.</p> <p>3.6. Lead staff team in planning and scheduling events, offers and programs.</p> |
| 4. Promote targeted events, offers and programs. | <p>4.1. Organise preparation of equipment and materials for planned events, offers and programs.</p> <p>4.2. Coordinate notification of relevant stakeholders for each event, offer or program.</p> <p>4.3. Manage promotion of events, offers and programs.</p> <p>4.4. Lead review of customer responses to events, offers and programs and implementation of refinements as required.</p> |

Required Skills and Knowledge

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

Required skills

- communication and interpersonal skills to inform and interact with staff and relevant personnel, verbally and non-verbally
- literacy and numeracy skills to:
 - calculate costs
 - read organisational policies and procedures
 - read information relating to customer behaviour and relationship management
- planning and organising skills to:
 - break down activities into individual tasks and allocate timeframes
 - manage own time
 - set achievable goals
- problem-solving skills to:
 - identify and select improvements to systems and processes
 - match new strategies to business goals
- technology skills to operate information and communication technology systems and software, including social media
- research skills to locate and analyse relevant information
- team leadership skills to:
 - delegate
 - motivate staff
 - recognise staff contributions
 - share information

Required knowledge

- analysis and reporting requirements for customer sales and service strategies
- customer relationship management systems, including social media
- customer types and needs, including:
 - customer buying motives
 - customer behaviour and cues
 - individual and cultural differences, demographics, lifestyles and incomes
- data collection and processing technologies, techniques and tools
- legislation and statutory requirements relating to customer relationship management, including work health and safety (WHS) requirements
- retail industry information networks and sources
- store policies and procedures in regard to:
 - establishing, maintaining and using customer records
 - methods of maintaining customer confidentiality and secure storage of customer details

- store and area merchandise and service range
- types of customer needs, including functional and psychological

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:

- leads staff participation in review of CRM systems and procedures
- consults on, selects and implements enhancements to CRM capabilities
- leads staff participation in:
 - review of customer relationships and loyalty levels
 - planning and scheduling events, offers and programs
- sets targets for increased loyalty
- identifies customer trends and preferences
- manages promotion of events, offers and programs
- reviews customer responses to events, offers and programs.

Context of and specific resources for assessment

Assessment must ensure access to:

- a retail work environment
- customer profiling data
- new and returning customers
- organisational customer relationship management system, including documented procedures
- retail customer service and sales teams.

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
- a role play
- customer feedback
- answers to questions about specific skills and knowledge
- review of portfolios of evidence and third-party workplace reports of on-the-job performance.

Guidance information for assessment

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

Range Statement

Not applicable.

Unit Sector(s)

Cross-Sector

Competency Field

Client and Customer Service