



Australian Government

Department of Education, Employment and Workplace Relations

SIRXMPR003A Conduct telemarketing

Revision Number: 2

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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
Second Release	Editorial updates

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to apply telemarketing techniques to secure orders or sales through directly approaching customers or by responding to incoming calls from customers.

Application of the Unit

This unit applies to frontline sales personnel who are responsible for ensuring that telemarketing technology is appropriately utilised, customer needs met, target calls identified, responses processed according to business requirements and that sales leads are followed up as required.

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. Confirm telemarketing processes.

- 1.1. Obtain and confirm details of ***campaign***.
- 1.2. Clarify matters relating to ***campaign objectives*** or responsibilities with ***relevant personnel***.
- 1.3. Prepare ***call guides*** and action lists where required.
- 1.4. Determine ***technology*** required for completion of assigned roles in campaigns.

2. Respond to customer enquiries using telemarketing technology.

- 2.1. Clearly establish ***customer*** needs.
- 2.2. Satisfy ***customer enquiries*** in a prompt and efficient manner.
- 2.3. Refer enquiries beyond individual capabilities or beyond scope of the campaign to relevant personnel or record for later response.
- 2.4. Follow up on information not supplied to the customer on initial enquiry and relay to the customer within the quickest possible time.
- 2.5. Apply ***sales and service techniques*** according to business and industry standards.
- 2.6. Discuss and confirm ***payment options*** with customer during sales transaction.
- 2.7. Confirm ***supply arrangements*** with customer during sales transaction.

3. Seek customers using telemarketing technology.

- 3.1. Identify and confirm call targets.
- 3.2. Identify telephone numbers from database.
- 3.3. Complete calls in the most efficient manner possible.
- 3.4. Ensure call principles and procedures conform to ***business policy and procedures***.
- 3.5. Record customer responses accurately to required level of detail.
- 3.6. Answer customer queries or refer to appropriate personnel according to ***business policy and procedures***.
- 3.7. Action customer requests, according to business policy and procedures.

4. Process telemarketing

- 4.1. Record and report ***customer requirements***.

- customer sales and orders.
 - 4.2. Accurately record **customer particulars**.
 - 4.3. Complete and report appropriate records, according to business processes and technology.
 - 4.4. Process customer's preferred payment and delivery options.
 - 4.5. Arrange **credit checks**, according to business and industry policy and requirements.
 - 4.6. Fully apply privacy arrangements during transaction.
- 5. Maintain telemarketing systems and technology.
 - 5.1. Maintain telemarketing systems and technology to business and manufacturer requirements.
 - 5.2. Report **faults or safety problems** with telemarketing systems and work space to relevant personnel.
- 6. Record campaign results.
 - 6.1. Process campaign results and **records** according to business processes and technology.
 - 6.2. Convey difficulties encountered reporting and recording campaign results to appropriate personnel.
 - 6.3. Assess performance against agreed targets and analyse for future improvement.

Required Skills and Knowledge

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

Required skills

- interpersonal skills to:
 - clarify matters relating to campaign objectives or responsibilities with relevant personnel
 - respond to customer enquiries
 - call customers
 - report faults or difficulties with reporting and recording to appropriate personnel through clear and direct communication
 - ask questions to identify and confirm requirements
 - use language and concepts appropriate to cultural differences
 - use and interpret non-verbal communication
 - collaborate with team members
 - clarify campaign details
- literacy and numerical skills to:
 - interpret business policy and procedures
 - interpret database entries
 - process sales transactions
 - record and analyse data
 - use appropriate technology to complete ascribed role
 - record and report information for business transactions and as required by business
- technical skills to:
 - apply privacy and security arrangements
 - solve routine operational problems
 - identify targets

Required knowledge

- store policy and procedures in regard to:
 - telecommunications, including telemarketing and telesales
 - interacting with customers
 - promoting products
 - processing sales transactions
- techniques in interpersonal communication
- relevant industrial or legislative requirements
- use and maintenance of technology
- Work Health and Safety (WHS) aspects of job
- relevant commercial law, legal and security requirements

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:

- satisfactory processing of a customer enquiry relating to a specific marketing campaign
- satisfactory processing of incoming sales calls from customers
- satisfactory processing or outgoing contact with customers to obtain sales, or recall or regain a customer
- matching customer requirements with business offerings
- recording sales
- retaining or regaining customers
- successful handling of a range of customer contingencies encountered during performance of telemarketing duties
- completion of communication tasks according to business procedures, e.g. phone orders and accompanying written confirmations, faxed order forms and confirmation documents, electronic order lodgement and accompanying hard copies of computer documents.

Context of and specific resources for assessment

Assessment must ensure access to:

- a real or simulated work environment
- relevant documentation, such as:
 - store policy and procedures manuals
 - campaign details
 - call guides
 - order forms
- a range of communication equipment.

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 the candidate in the workplace
- third-party reports from a supervisor
- customer feedback
- role play

- written or verbal questioning to assess knowledge and understanding
- 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

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.

Campaign may vary to accommodate regional variations in:

- demographics
- economics
- competition
- social and cultural factors
- political influences
- legal factors
- natural factors
- technology.

Campaign objectives may vary according to:

- product or service
- merchandising and sales strategy
- sales
- promotional strategies, including:
 - duration
 - cycle
 - territory coverage
 - product or service focus.

Relevant personnel may include:

- supervisor
- team leader
- manager
- specialist technical staff.

Call guides may be:

- prepared internally or externally
- in hard or electronic form
- automated or manual.

Technology may include:

- personal computers or terminals, which may be stand-alone or networked
- point-of-sale terminals
- telecommunications equipment
- software, including:
 - word processing
 - databases
 - spreadsheets
 - financial
 - inventory
- electronic data interchange (EDI).

Customers may include:

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

Customer enquiries may relate to:

- warranties
- use-by dates
- storage requirements
- stock availability
- product range
- features and benefits of products
- price
- delivery
- progress of order placed.

Sales and service techniques may include:

- questioning and active listening
- sales closing techniques
- associated sales techniques, including:
 - trade-up
 - trade-in
 - tie-ins
 - cut-ins
 - range-ins
- negotiation skills
- over-the-phone empathy creation
- securing payment.

Payment options may include:

- credit card
- electronic funds transfer
- cheque
- money order
- hire purchase
- cash on delivery (COD)
- customer account.

Supply arrangements may include:

- delivery of products
- provision of services
- maintenance and support agreements
- leasing agreements and consultancies
- research and development.

Business policy and procedures may relate to:

- use of telecommunications technology
- maintaining and utilising client records
- promotional and marketing programs
- sale and supply of products and services
- interaction with customers.

Customer requirements may relate to:

- product type
- brand
- size
- quantity
- product characteristics
- method of delivery
- price.

Customer particulars may include:

- customer's name and contact details
- transaction records
- personal preferences
- anniversaries and special dates
- details of items bought or returned.

Credit check procedures may include:

- automated or manual
- completed internally or by external agent.

Faults or safety problems may include:

- spills
- sharp edges
- loose wiring
- transaction faults
- equipment and technology faults.

Records may include:

- manual or electronic records
- purchase requests and orders
- tender submissions and proposals
- invoices and payment requests
- statements and petty cash vouchers
- offer and contract documents
- evaluation process documentation
- records of authorised officers' decisions
- corporate credit card transaction statements
- records of supplier performance
- financial statements
- asset registers
- records of conversation.

Unit Sector(s)

Cross-Sector

Competency field

Marketing and Public Relations