



Australian Government

SIRXSL303 Build relationships with customers

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 SIRXSL004A Build relationships with customers.

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to develop and maintain expert knowledge to provide accurate product information to customers, including post-sales support.

It also covers communication, analysis and sales techniques to plan and implement sales presentations, build positive relationships with customers, and resolve customer complaints to ensure positive business outcomes.

Application of the Unit

This unit applies to senior 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. Develop relationships with customers.	1.1.Establish rapport with customers and express genuine interest to clarify customer requirements and enhance outcomes. 1.2.Maintain professional ethics with the customer to promote store image and credibility. 1.3.Identify customer needs and preferences to maximise sales opportunities. 1.4.Maximise sales opportunities by use of add-on and complementary sales techniques. 1.5.Give customer space and time to evaluate purchase decision, while using time to maximum advantage for customer and store. 1.6.Use effective methods to close sales.
2. Apply expert knowledge.	2.1.Provide customer with accurate information regarding product and service appraisals, correct statements and warranties according to legislative requirements. 2.2.Provide detailed knowledge of supplier or manufacturer information according to customer needs and commercial confidentiality guidelines. 2.3.Provide evaluation of product range, demonstrate features and benefits of products or services where appropriate, and make recommendations to the customer to maximise sales potential. 2.4.Maximise customer interest in product or service through price negotiation where applicable and offer payment and credit options according to store policy. 2.5.Calculate prices and discounts according to pricing determinants and store policy.
3. Provide post-sales support.	3.1.Provide evidence of ongoing support as sale is concluded. 3.2.Explain back-up service and reassure customer according to legislative requirements and store policy. 3.3.Provide customer with store or salesperson's contact details to ensure customer follow-up according to store policy. 3.4.Enter customer and transaction details into customer database according to store policy.

4. Plan sales presentations.
 - 4.1. Plan presentation to complement **product characteristics**.
 - 4.2. Select client group according to product characteristics and store merchandising policy.
 - 4.3. Access **promotional materials** where required and distribute to client group.
 - 4.4. Select and prepare a range of products or services for presentation to reflect store image, demographics and merchandising plan.
5. Implement sales presentations.
 - 5.1. Ensure sufficient numbers of adequately briefed support staff, where required, for presentation.
 - 5.2. Apply communication skills to effectively create interest, focus attention, and encourage customer interaction with individuals or groups.
 - 5.3. Demonstrate products or services to create a buying environment.
 - 5.4. Measure results of sales presentation according to predetermined criteria, review overall performance and results, and apply information to enhance future **sales presentations**, according to store sales policy.
6. Maintain and use a customer database.
 - 6.1. Maintain customer confidentiality as required by store policy and legislative requirements.
 - 6.2. Develop and maintain accurate **customer records** and store securely according to store policy and procedures.
 - 6.3. Identify and follow up regular customers according to store marketing policy.
 - 6.4. Use customer records to advise customers on products and services of possible interest.
 - 6.5. Implement **customer loyalty schemes** where required according to store promotional activities.
7. Deal with difficult customers.
 - 7.1. Acknowledge customer complaints and problems and reassuringly support difficult customers to produce positive outcome.
 - 7.2. Use questioning and active listening to encourage customer to verbalise issue and minimise customer frustration.
 - 7.3. Develop customer's confidence in the candidate and product or service to promote long-term trust and commitment to store.
 - 7.4. Establish mutually acceptable resolution of complaint.

Required Skills and Knowledge

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

Required skills

- communication and interpersonal skills to resolve conflict
- literacy and numeracy skills to:
 - access and read relevant product information
 - calculate prices and discounts
 - read store policies and procedures
 - record client and sales information
- sales skills to apply selling techniques, including:
 - add-ons and complementary sales
 - identifying buying signals
 - opening and closing techniques
 - overcoming customer objections
 - presenting product information
 - promoting enhanced sustainability features of selected products and services
 - using strategies to focus customer on specific merchandise

Required knowledge

- customer types and needs, including:
 - customer buying motives, customer behaviour and cues
 - functional and psychological needs
 - individual and cultural differences, demographics, lifestyle and income
- work health and safety (WHS) requirements relating to:
 - manual handling
 - plant and equipment
 - hazardous substances and dangerous goods
 - workers compensation
- relevant industry codes of practice, legislation and statutory requirements relating to building relationships with clients
- store policies and procedures in regard to:
 - efficient use of resources
 - establishing, maintaining and using customer records
 - methods of maintaining customer confidentiality and secure storage of customer details
 - price negotiation and payment and credit options
 - pricing, including GST requirements
 - resolving customer complaints
 - updating and maintaining customer mailing lists

- store and area merchandise and service range

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:

- applies:
 - detailed knowledge of manufacturer and supplier supply, back-up service and warranty information to enhance customer support
 - industry codes of practice, relevant legislation and statutory requirements in regard to selling products and services
 - store policies and procedures in regard to selling products and services, dealing with customers, planning and implementing sales presentations, and providing after-sales support
- develops customer commitment to store and builds return customer base by establishing rapport and relationship with customer, maintaining professional ethics, and discerning customer buying motives, requirements and preferences
- establishes, records and maintains customer records and details, maintaining customer confidentiality, ensuring secure storage of data, and using customer records to maximise customer interest and create a buying atmosphere
- evaluates personal or team sales performance to maximise future sales
- maximises sales opportunities by using effective selling techniques, applying detailed product knowledge, and using an appropriate sales approach to sell the benefits of products, overcome objections and close sales
- plans, prepares and conducts sales presentations and briefs
- supports staff where required, to create a buying environment and maximise sales performance
- resolves customer complaints by acknowledging problems and supporting customer to produce positive outcomes and obtain mutually acceptable complaint resolution
- uses effective questioning, listening and observation skills to determine customer requirements.

Context of and specific resources for assessment

Assessment must ensure access to:

- a retail work environment
- relevant sources of product information
- relevant documentation, such as:

- policy and procedures manuals
- industry codes of practice and relevant legislation
- WHS legislation and codes of practice
- a range of customers with different requirements
- an appropriate range of products and equipment
- a customer database system.

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 the candidate in the workplace
- customer feedback
- 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, 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.

Customers may include:

- a single customer, couples, families or groups
- 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.

Clarification of customer requirements may be achieved by:

- active listening
- appropriate questioning
- empathy
- observation
- reassurance and confirmation.

Outcomes may include:

- credibility of store
- customer commitment
- customers' trust
- increased return customer base.

Maintaining **professional ethics** with the customer may include:

- confirmed appraisals of products and services
- honesty
- positive statements.

Customer needs and preferences may include:

- brand
- customer physical needs
- price
- product characteristics
- product type
- size.

Sales techniques will include:

- add-on and complementary products and services
- selling up or down
- suggestive selling
- variety of methods of closing sales.

Legislative requirements may include:

- environmental protection legislation
- health and welfare law specific to local government, state and federal legislation
- liquor laws

- WHS
 - pricing procedures, including GST requirements
 - privacy laws
 - sale of second-hand goods
 - tobacco laws
 - Australian Consumer Law and fair trading Acts
 - transport, storage and handling of goods.
- Store policy*** and procedures in regard to:
- dealing with difficult customers
 - maintaining and using client records
 - promotional, marketing, discounting and reward programs
 - resolving customer complaints
 - selling products and services.
- Back-up service*** may include:
- delivery specifications
 - financial products and services
 - installation
 - returns policies
 - technical support
 - warranties and guarantees.
- Customer database*** may be:
- computer-based
 - manual.
- Product characteristics*** may include:
- features and benefits
 - price range
 - supplier or manufacturer information
 - target group.
- Promotional materials*** may include:
- brochures
 - business cards
 - pamphlets
 - posters
 - promotional merchandise
 - vouchers.
- Sales presentations*** may be:
- at client site
 - in-house
 - verbal
 - visual.
- Customer records*** may include:
- anniversaries and special dates
 - details of items bought or returned
 - name and contact details
 - personal preferences
 - transaction records.

Customer loyalty

schemes may include:

- credit or discount facilities
- customer clubs
- customer reward schemes
- special offers.

Unit Sector(s)

Cross-Sector

Competency Field

Sales