
BSB30215 CERTIFICATE III IN CUSTOMER ENGAGEMENT

Assessment Requirements for all units as at training.gov.au

BSBCUE301 Use multiple information systems**Performance Evidence**

Evidence of the ability to:

- access, use and manage information systems to organisational requirements
- navigate systems to locate information required to complete customer inquiry or transaction
- identify and rectify information system and processing errors to established procedures and policies
- provide service to customers in accordance with organisational and regulatory requirements.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- explain computer and system troubleshooting principles
 - identify enterprise business systems and operating platforms relevant to role
 - identify enterprise policies, procedures and guidelines regarding use and security of information systems
 - explain operation of social networking websites
 - explain escalation process for reporting information technology issues.
-

BSBCUE307 Work effectively in customer engagement**Performance Evidence**

Evidence of the ability to:

- achieve identified KPIs in a customer engagement role in compliance with organisational processes, policies and procedures
- develop and maintain a professional approach to own role and responsibilities
- participate effectively in team-based operations, contributing to establishment of objectives and achievement of outcomes.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- describe customer base, company products and services
- explain performance indicator requirements and performance management outcomes
- explain industry-specific regulatory and legislative requirements in relation to customer engagement
- outline operational systems used within scope of own role and scope of customer engagement operations and key relationships
- outline organisational mission and business goals.

BSBCUE309 Develop product and service knowledge for customer engagement operation

Performance Evidence

Evidence of the ability to:

- use a range of sources to identify key features and benefits of products and services within area of business
- prepare information for customer engagement in compliance with legal and organisational requirements.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- describe features, benefits, strengths and weaknesses of a range products or services available in the organisation
- outline organisational policies and procedures relevant to customer engagement activities
- identify processes used to describe products or services
- describe ethical principles and key provisions of relevant legislation, codes of practice and national standards affecting customer engagement operations.

BSBCUS301 Deliver and monitor a service to customers

Performance Evidence

Evidence of the ability to:

- use communication skills to establish rapport and build relationships with customers in accordance with organisational requirements
- identify customer needs using appropriate questioning and active listening skills
- provide customer service in accordance with organisational requirements

-
- respond to and record customer feedback and action taken according to organisational standards, policies and procedures
 - produce a report which identifies and recommends ways to improve service delivery.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- summarise key provisions of relevant legislation from all levels of government that may affect aspects of business operations
 - explain organisational policy and procedures for customer service, including handling customer complaints
 - provide examples of verifiable evidence that could be used to review customer satisfaction
 - outline the interpersonal skills needed for serving customers, including customers with specific needs.
-

BSBWOR201 Manage personal stress in the workplace

Performance Evidence

Evidence of the ability to:

- recognise and understand potential stress in the work environment
- develop and use techniques and strategies to manage stress and stressful situations
- adopt and monitor potential sources of stress and fatigue, seeking assistance as required
- monitor own performance against performance requirements and key performance indicators (KPIs)
- use techniques to achieve work/life balance.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- describe job role priorities and KPIs
 - list internal and external sources of assistance, including escalation pathways
 - outline signs and sources of existing and potential stress or difficult situations
 - discuss stress management and reduction techniques
 - describe time management tools and techniques.
-

FNSSAM301 Identify opportunities for cross-selling products and services

Performance Evidence

Evidence of the ability to:

- interact with customers and identify cross-selling opportunities
- clearly explain additional products and services that may be beneficial to customers and provide options based on customer needs in line with relevant legislation, regulations and industry codes of practice
- refer customers to other appropriate sections of the organisation, as required
- complete relevant documentation following organisational procedures.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- identify and describe customer relations building techniques
- outline the key features of financial products and services offered by or through an organisation
- explain the key features of finance industry and organisational policy and procedures
- explain the organisational process and procedures for cross-selling services and products
- describe the key features of a range of products including:
 - interest rates
 - terms
 - special packages
- explain the key requirements of relevant legislation and the potential and/or actual impact on information requested or provided
- compare and contrast selling techniques

BSBCUE304 Provide sales solutions to customers

Performance Evidence

Evidence of the ability to:

- recommend product or service to match customer need with a clear explanation of price and payment options
- apply appropriate credit checks
- organise customer payment and delivery details
- record sales, payments and delivery arrangements

-
- provide after sales service.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- explain estimate and quote procedures
 - outline marketing and sales principles and practices
 - identify organisational pricing policies
 - identify organisational protocols associated with customer service and sales
 - identify statutory, regulatory and legislative requirements related to providing sales solutions to customers.
-

BSBITU203 Communicate electronically

Performance Evidence

Evidence of the ability to:

- follow organisational and service provider requirements when communicating electronically
- follow organisational policy and procedures when managing all aspects of electronic communication
- comply with netiquette
- collaborate in accordance with agreed parameters for electronic communication
- identify most appropriate software applications.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- identify different methods of electronic communication
 - outline key provisions of relevant legislation that affect aspects of business operations
 - outline relevant organisation policies and procedures.
-

BSBWHS302 Apply knowledge of WHS legislation in the workplace

Performance Evidence

Evidence of the ability to:

- identify and apply work health and safety (WHS) legislative requirements applicable to the workplace, occupation and industry, including keeping up to date with legislation and relevant publications
- identify and act on non-compliances with WHS legislation
- identify duty holders

-
- communicate WHS information to others
 - refer issues of non-compliance to responsible persons or authorities and seek advice from appropriate sources.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- explain the WHS legislative duties of self and others including limits on own expertise
 - outline the key organisational WHS policies, procedures, processes and systems
 - outline the key requirements in relevant commonwealth and state or territory WHS Acts, regulations, codes of practice, standards and guidance material, and other relevant publications
 - identify obligations and duties for consultation and who must be consulted
 - identify people who could be accessed for help
 - identify the consequences of non-compliance
 - explain ways to get information about compliance with legislation
-

BSBWOR301 Organise personal work priorities and development

Performance evidence

Evidence of the ability to:

- prepare a work plan according to organisational requirements and work objectives
- use business technology to schedule, prioritise and monitor completion of tasks in a work plan
- assess and prioritise own work load and deal with contingencies
- monitor and assess personal performance against job role requirements by seeking feedback from colleagues and clients
- identify personal development needs and access, complete and record skill development and learning.

•

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- outline key provisions of legislation that relate to own work role
- describe goals, objectives or key performance indicators of own work role
- explain ways to elicit, analyse and interpret feedback when communicating with other people in the workplace
- explain the principles and techniques of goal setting, measuring performance, time management and personal assessment of learning and development needs
- explain signs and sources of stress and strategies to deal with stress in the workplace
- identify methods to identify and prioritise personal learning needs.

BSBCMM301 Process customer complaints

Performance Evidence

Evidence of the ability to:

- process and document customer complaints according to organisational and legislative requirements
- use effective communication techniques to discuss options and resolve complaints
- follow correct procedures when referring and following up complaints.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- identify the key provisions of relevant legislation from all forms of government that may affect aspects of business operations
 - explain the communication skills required when handling customer complaints
 - outline organisational procedures and standards for processing complaints
 - list external bodies to which complaints could be referred.
-

BSBWOR203 Work effectively with others

Performance Evidence

Evidence of the ability to:

- identify own responsibilities in relation to the team and the organisation's requirements
- work effectively in a workgroup including:
 - supporting team members
 - using culturally appropriate communication skills
 - acting on constructive feedback
 - cooperating and contributing to team goals
 - identifying improvement opportunities
- identify problems and conflicts and address them appropriately.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- outline the organisational standards, policies and procedures that relate to own work role
- outline team responsibilities and duties and their relationship to individual responsibilities and duties.
- summarise conflict resolution techniques.