

PRMCMN402A Facilitate effective client relationships

Unit descriptor

This unit of competency involves the skills and knowledge to establish business contacts and networks and manage such relationships in a flexible and effective manner. Such relationships are of a more complex nature where the individual needs to explore with the client which products and services could improve or enhance current operations. This unit requires the individual to be familiar with a wide range of organisational products/services.

This unit of competency may be expected to apply to a worker who has significant contact with external clients. The worker could provide information on routine, well-defined services/products to clients, or deal with inquiries of a more complex nature, including pricing. This unit would usually be carried out under supervision, within organisational guidelines.

ELEMENT

PERFORMANCE CRITERIA

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| 1 Identify and monitor client needs | 1.1 Conduct regular discussions with <i>client</i> regarding <i>clients needs</i> and expectations in accordance with <i>company requirements</i> |
| | 1.2 Seek feedback on company performance and level of <i>client</i> satisfaction in accordance with <i>company requirements</i> |
| | 1.3 Take prompt action on feedback received from the <i>client</i> in accordance with <i>company requirements</i> |
| | 1.4 Review and implement contracts and/or variations to contracts in accordance with <i>company requirements</i> |
| 2 Satisfy complex client needs | 2.1 Explain possibilities for meeting <i>client needs</i> in accordance with <i>company requirements</i> |
| | 2.2 Assist clients to evaluate service/product options to satisfy their needs in accordance with <i>company requirements</i> |
| | 2.3 Determine and prioritise preferred action in accordance with <i>company requirements</i> |
| | 2.4 Identify potential areas of difficulty in <i>client</i> service delivery and take appropriate actions in accordance with <i>company requirements</i> |

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ELEMENT	PERFORMANCE CRITERIA
3 Establish business contacts and networks	<p>3.1 Identify organisations and groups that have the potential to benefit from company products/services in accordance with <i>company requirements</i></p> <p>3.2 Identify appropriate individuals within the group or organisation in order to establish effective relationships in accordance with <i>company requirements</i></p> <p>3.3 Agree on and maintain methods of <i>communication with business contacts and networks</i> within own level of responsibility in accordance with <i>company requirements</i></p> <p>3.4 Gain and maintain trust and confidence of <i>business contacts and networks</i> through demonstration of high standards of business practices and effective <i>communication methods</i> in accordance with <i>company requirements</i></p>
4 Work effectively with business contacts	<p>4.1 Define, clarify and agree on roles and responsibilities of <i>business contacts</i> in accordance with <i>company requirements</i></p> <p>4.2 Set and adhere to realistic service commitments in accordance with <i>company requirements</i></p> <p>4.3 Adopt and encourage flexibility in normal work practices when operating under unusual or difficult situations in accordance with <i>company requirements</i></p> <p>4.4 Identify situations outside own area or level of responsibility and where appropriate discuss with or refer to <i>appropriate personnel</i> in accordance with <i>company requirements</i></p>

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ELEMENT

PERFORMANCE CRITERIA

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| 5 Promote the company | 5.1 Develop strategies to represent and promote the company's interests and requirements |
| | 5.2 Suggest for consideration additional products/services and <i>information</i> to meet <i>client's</i> needs in accordance with <i>company requirements</i> |
| | 5.3 Encourage <i>work group</i> members to develop effective and friendly relationships with <i>client</i> and users of <i>client</i> facilities |
| 6 Communicate advice and pricing information | 6.1 Present <i>written and verbal responses</i> in accordance with <i>company requirements</i> |
| | 6.2 Provide pricing information for routine and specified <i>products and services</i> where these match <i>client</i> needs, in accordance with <i>company requirements</i> |
| | 6.3 Attend to <i>client</i> requirements for follow-up information promptly in accordance with <i>company requirements</i> |
| | 6.4 Schedule and confirm bookings with <i>client</i> in accordance with <i>company requirements</i> |

RANGE STATEMENT

The range statement links the required knowledge and organisational and technical requirements to the workplace context. It describes any contextual variables that will be used or encountered when applying the competency in work situations. It allows for different work practices and work and knowledge requirements as well as for differences between organisations and workplaces. The following variables may be present for this particular unit.

Appropriate personnel may include:

- colleagues
- staff or employee representatives
- supervisor/line manager
- suppliers/manufacturers.

Business contacts and networks may include the following groups and individuals within them:

- community groups
- departments or branches of the organisation
- organisations with industry linkages
- organisations with similar industry functions

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- potential and current customers
- staff or employee organisations
- suppliers
- technicians.

Client needs may relate to:

- advice or general information
- domestic, commercial or industrial interests
- hours of operation
- making complaints/suggestions
- purchasing products and services
- specific requests.

Clients may include:

- clients with routine or special requests
- people from a range of social, cultural or ethnic backgrounds
- regular and new clients including but not limited to:
 - business enterprises
 - government agencies
 - suppliers.

Communication may include:

- communications book
- company presentations
- correspondence
- email
- exchange of reports and information
- inspections by client
- personal visits
- site news sheet
- telephone discussions.

Company requirements may include:

- code of ethics
- company image
- legal and organisational policies/guidelines
- legislation relevant to the work or service function
- legislative and regulatory requirements including:
 - codes of conduct
 - consumer law
 - discrimination/equal employment opportunity

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- environmental law
- harassment and other laws specific to local government, state and federal legislation
- OHS
- privacy legislation
- OHS policies, procedures and programs
- personnel practices and guidelines outlining work roles, responsibilities and delegations
- quality systems, standards and guidelines
- staff appearance and presentation.

Information may be:

- communicated electronically e.g. by email
- contained in company databases
- contained in manufacturers' specifications or information
- information on products/services available including features and benefits
- provided verbally
- quotations/pricing estimates
- written e.g. product brochures.

Products and services may include procedures for:

- allocating appointments
- communicating with clients
- delivering products and services
- responding to complaints or suggestions.

Work group members may include:

- colleagues
- line managers
- staff
- supervisors.

Written or verbal responses may include:

- general advice
- information on products/services available including features and benefits
- quotations/pricing estimates
- standard industry disclaimers.

EVIDENCE GUIDE

Critical aspects of competency

- Demonstrated proactive client relationship-building skills.

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- Detailed knowledge of products and services and the capacity to explain to clients the features and benefits of products and services.
- Ability to identify and utilise opportunities for establishing business contacts and networks.
- Ability to present information in a variety of formats to a range of business contacts.

Knowledge needed to achieve the performance criteria

Knowledge and understanding are essential to apply this unit in the workplace, to transfer the skills to other contexts, and to deal with unplanned events. The knowledge requirements for this unit are listed below.

- The range of potential and actual business contacts and networks.
- Establishing and maintaining effective business contacts and networks.
- Range of products/services/commitments available to offer to business contacts.
- Principles of time management.
- Role of designated personnel in client referrals.
- Sales presentation skills.
- Organisational client service standards.
- Importance of client service, good communication and an individual's role in delivering customer service.
- Client groups.

Specific skills needed to achieve the performance criteria

To achieve the performance criteria, some complementary skills are required. These relate to the ability to:

- use communication skills that assist in facilitating client relationships including:
 - active listening
 - accessing, synthesising and using information
 - displaying empathy tact and diplomacy
 - negotiation
 - confidence-building
 - assertiveness
- use time management skills
- use problem-solving skills
- be flexible in handling variations in client needs
- use language skills which allow for relationship-building with the client
- use literacy skills to the level required to complete and interpret business documentation
- use numeracy skills to the level required to provide accurate pricing estimates and quotations
- use technology skills to complete business documentation

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- relate to people from a range of social, cultural and ethnic backgrounds.

Other units of competency that could be assessed with this unit

Where practical, this unit should be assessed in an integrated fashion with other appropriate units.

This unit could be assessed on its own or in combination with other competencies relevant to the job function.

Resources required to assess this unit

Practical assessment will frequently be in the workplace or a suitable similar environment. Access to such an environment will be required.

The candidate and the assessor should have access to the appropriate documentation and resources normally utilised in the workplace. This includes access to the following:

- a suitable work area, or a simulated workplace environment, that allows for observation of client:candidate interaction
- products and information utilised in the provision of promoting company services
- assessment documentation forms and record books.

Gaining evidence to assess this unit

For valid and reliable assessment of this unit, the competency should be demonstrated over a period of time and be observed by the assessor (or assessment team working together to conduct the assessment). The competency is to be demonstrated in a range of situations that may include client/workplace interruptions and involvement in related activities normally experienced in the workplace.

This unit is essentially skills-based and it is expected that assessment will be largely practical (i.e. workplace-based or by simulation) in nature, supported by questioning to assess underpinning knowledge.

Performance and assessment of this unit must be carried out within the relevant requirements of the legislative and industry framework and as set out in organisational OHS policies and procedures. Assessment requires that establishing and maintaining customer relationships is done in such a way as to meet the objectives of the company and industry expectations.

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Key competency levels

There are a number of processes learnt throughout work and daily life which are required in all jobs. They are fundamental processes and generally transferable to other work environments. Some of these work processes are covered by the *key competencies* listed below. Information provided to each question highlights how these processes are applied in this unit of competency.

The number in brackets indicates the level to which the key competency should be demonstrated.

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|------------------------------|---|---|
| 1 Perform the process | 2 Perform and administer the process | 3 Perform, administer and design the process |
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How can information be collected, analysed and organised (2) ?	<i>Identify and utilise networking opportunities.</i>
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How can communication of ideas and information (2) be applied?	<i>Identify and pursue business opportunities through information-sharing and negotiation.</i>
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How are activities planned and organised (2) ?	<i>Organise or reorganise work tasks in relation to business contracts and/or variations to such.</i>
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How can teamwork (2) be applied?	<i>Develop a strong work team to support the strengthening of client services.</i>
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How can the use of mathematical ideas and techniques (1) be applied?	<i>Design work allocation and scheduling arrangements.</i>
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How can problem-solving skills (2) be applied?	<i>Identify where business contacts and network arrangements can be enhanced.</i>
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How can the use of technology (2) be applied?	<i>Store and retrieve client and product information and communicate via e-business communication modes.</i>
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