

This unit describes the performance outcomes, skills and knowledge required to manage the ongoing relationship with a customer, which includes assisting the customer to articulate their needs, meeting customer needs and managing networks to ensure customer needs are addressed.

Designed for: This unit applies to workers required to be familiar with a product and/or service that varies widely and is capable of significant customisation. The customer relationship would typically involve direct interaction a number of times over an extended period.

This unit is appropriate to workers who are expected to have detailed product knowledge in order to recommend customised solutions. They would be expected to apply organisational procedures and be aware of, and apply as appropriate, broader factors involving ethics, industry practice and relevant government policies and regulations.

Duration: 1 day

Elements of Competency and Performance Criteria

Assist customer to articulate needs

- Ensure customer needs are fully explored, understood and agreed
- Explain and match available services and products to customer needs
- Identify and communicate rights and responsibilities of customers to the customer as appropriate

Satisfy complex customer needs

- Explain possibilities for meeting customer needs
- Assist customers to evaluate service and/or product options to satisfy their needs
- Determine and prioritise preferred actions
- Identify potential areas of difficulty in customer service delivery and take appropriate actions in a positive manner

Manage networks to ensure customer needs are addressed

- Establish effective regular communication with customers
- Establish, maintain and expand relevant networks to ensure appropriate referral of customers to products and services from within and outside the organisation
- Ensure procedures are in place to ensure that decisions about targeting of customer services are based on up-to-date information about the customer, and the products and services available
- Ensure procedures are put in place to ensure that referrals are based on the matching of the assessment of customer needs and availability of products and services
- Maintain records of customer interaction in accordance with organisational procedures



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