

Certificate IV in Customer Engagement BSB40315

**Unit Descriptions & Evidence Required
to Demonstrate Competency**

13 Units

3 Core Units

(4 Units Group A

6 General Electives)



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Course Description

This qualification reflects the role of individuals who typically undertake complex customer interactions, often as a team leader and with significant authority to delegate.

Duties at this level may include using multi-channel communications; receiving and responding to complex customer requests or enquiries; handling customer complaints; applying key performance indicators; leading a team; coaching staff; scheduling and organising; and gathering, interpreting and organising data capture.

Candidates undertaking this qualification require sound communication and interpersonal skills.

They may provide technical advice and support to a team.

Job roles

Job roles and titles vary across different industry sectors. Possible job titles relevant to this qualification include:

- contact centre team leader
- quality assurance coordinator
- customer contact coach
- analyst
- scheduler
- complex enquiry customer contact operator

Pathways Information

Pathways into the qualification

Preferred pathway for candidates considering this qualification include:

- BSB30215 – Certificate III in Customer Engagement or other relevant qualifications
- vocational experience assisting in a range of support roles without a formal business qualification.

Pathways from the qualification

- BSB50315 - Diploma of Customer Engagement or a range of other Diploma qualifications.

Entry Requirements

There are no entry requirements for this qualification.

What you must do to complete the course

To be awarded BSB40315 - Certificate IV in Customer Engagement, competency must be achieved in 10 units as noted on the contents page.

BSBCUS401 - (Core) Coordinate implementation of customer service strategies

Unit Description

This unit describes the skills and knowledge required to advise, carry out and evaluate customer service strategies.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Application of the Unit

It applies to individuals who have well developed skills and a broad knowledge of customer service strategies for addressing customer needs and problems, and who may provide guidance or delegate work related tasks to others.

Evidence Guide

Critical aspects for assessment and evidence required to demonstrate competency in this unit

The evidence required to demonstrate competency in this unit must be relevant to workplace operations and satisfy holistically all of the requirements of the performance criteria and required skills and knowledge.

Evidence of the following is essential for a participant to demonstrate competency in this unit:

- identify the needs and priorities of the organisation in delivering services to customers
- diagnose problems in delivery of customer service
- respond to and report on customer feedback and complaints
- review client satisfaction using verifiable data
- consult and communicate effectively with relevant people
- develop and implement strategies and methods to improve customer service delivery including:
 - budgeting
 - promotion to staff
 - documentation and follow up.
- outline the principles of customer service
- explain sources of information and techniques for identifying customer needs and reviewing customer satisfaction
- explain the organisational business structure, products and services related to customer service
- describe product and service standards and best practice models.

BSBLED401 - (Core) Develop teams and individuals

Unit Descriptor

This unit describes the skills and knowledge required to determine individual and team development needs and to facilitate the development of the workgroup.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Application of the Unit

It applies to individuals with a broad knowledge of learning and development who apply their skills in addressing development needs to meet team objectives. They may have responsibility to provide guidance or to delegate aspects of tasks to others.

Evidence Guide

Critical aspects for assessment and evidence required to demonstrate competency in this unit

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.

Evidence of the following is essential for a participant to demonstrate competency in this unit:

- systematically identify and implement learning opportunities for others
- collect feedback on team and individual performance
- give and receive feedback from team members to encourage participation in and effectiveness of the team
- collaboratively develop learning plans to match skill needs of individuals and groups
- provide mentoring and coaching assistance to teams and individuals
- monitor and review workplace learning.
- describe facilitation techniques to encourage team development and improvement
- outline organisational policies, plans and procedures for developing teams
- identify career paths and competency standards relevant to the industry.

BSBWHS401 - (Core) Implement and monitor WHS policies, procedures and programs to meet legislative requirements

Unit Descriptor

This unit describes the skills and knowledge required to implement and monitor an organisation's work health and safety (WHS) policies, procedures and programs in the relevant work area in order to meet legislative requirements.

NOTE: The terms 'occupational health and safety' (OHS) and 'work health and safety' (WHS) are equivalent and generally either can be used in the workplace. In jurisdictions where the Model WHS Legislation has not been implemented RTOs are advised to contextualise the unit of competency by referring to the existing State/Territory OHS legislative requirements.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Application of the Unit

It applies to individuals with supervisory responsibilities for implementing and monitoring the organisation's WHS policies, procedures and programs in a work area. These individuals have a broad knowledge of WHS policies and contribute well developed skills in creating solutions to unpredictable problems through analysis and evaluation of information from a variety of sources. They provide supervision and guidance to others and have limited responsibility for the output of others.

Evidence Guide

Critical aspects for assessment and evidence required to demonstrate competency in this unit

The evidence required to demonstrate competency in this unit must be relevant to workplace operations and satisfy holistically all of the requirements of the performance criteria and required skills and knowledge.

Evidence of the following is essential for a participant to demonstrate competency in this unit:

- explain clearly and accurately to work team the relevant work health and safety (WHS) information including:
 - WHS legislative and organisational requirements
 - identified hazards and outcomes of risk assessment and control
- ensure that the team has access to information about WHS policies, procedures and programs in appropriate structure and language
- implement and monitor procedures according to organisational and legislative WHS requirements including:
 - consultation and communications to enable team members to participate in managing WHS risks and hazards
 - identifying WHS training needs and providing learning opportunities, coaching and mentoring as appropriate to needs

- identifying, reporting and taking action on WHS hazards and risks
 - identifying and reporting inadequacies in existing risk controls and monitoring outcomes to ensure a prompt organisational response
 - reporting on the cost of WHS training
 - keeping WHS records
 - analysing aggregate WHS data to identify hazards and monitor risk control procedures in work area.
- outline the legal responsibilities and duties of managers, supervisors, persons conducting businesses or undertakings (PCBUs) and workers in relation to WHS risk management in the workplace
 - identify key provisions of relevant WHS Acts, regulations and codes of practice that apply to the business and outline how they apply in the work area
 - explain organisational policies and procedures relating to hazard identification, risk management, fire, emergency and evacuation, incident investigation and reporting
 - explain the importance of effective consultation mechanisms in managing health and safety risks in the workplace
 - explain how the hierarchy of control applies in the work area.

BSBCUS402 - (Elective) Address customer needs (must do)

Unit Description

This unit describes the skills and knowledge required to manage an ongoing relationship with a customer over a period of time. This includes helping customers articulate their needs and managing networks to ensure customer needs are addressed.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Application of the Unit

It applies to individuals who are expected to have detailed product knowledge in order to recommend customised solutions. In this role, individuals 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..

Evidence Guide

Critical aspects for assessment and evidence required to demonstrate competency in this unit

The evidence required to demonstrate competency in this unit must be relevant to workplace operations and satisfy holistically all of the requirements of the performance criteria and required skills and knowledge.

Evidence of the following is essential for a participant to demonstrate competency in this unit:

- communicate effectively with customers including
 - helping customers to articulate their needs and evaluate options
 - explaining products/services and how they match customer needs
 - establishing regular communication
 - explaining customer rights and responsibilities
- address customer's needs
- use organisational procedures to document customer satisfaction
- develop and maintain networks to support meeting customer needs
- identify potential difficulties in meeting customer needs and taking appropriate action.
- explain organisational procedures and standards for establishing and maintaining customer service relationships
- describe informed consent
- explain consumer rights and responsibilities
- describe ways to establish effective regular communication with customers
- outline details of products or services including with reference to:
 - possible alternative products and services
 - variations within a limited product and service range.

BSBCUS403 - (Elective) Implement customer service standards (must do)

Unit Descriptor

This unit describes the skills and knowledge required to contribute to quality customer service standards within an organisation.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Application of the Unit

It applies to individuals who may be frontline managers, team leaders or supervisors who have responsibility for ensuring that customer service systems and customer service standards are implemented.

Evidence Guide

Critical aspects for assessment and evidence required to demonstrate competency in this unit

The evidence required to demonstrate competency in this unit must be relevant to workplace operations and satisfy holistically all of the requirements of the performance criteria and required skills and knowledge.

Evidence of the following is essential for a participant to demonstrate competency in this unit

- access, interpret, apply and monitor customer service standards
- demonstrate compliance with customer service system and standards
- make contributions to improving or adapting customer service standards to better meet the needs of the organisation and the customers
- review and analyse customer feedback and make recommendations to address issues raised, including identifying the resources required
- make adjustments to improve customer service procedures including:
 - identifying and responding to problems
 - communicating with and encouraging staff
- coordinate and manage delivery of services and products to meet standards including:
 - planning and implementing team work activities
 - managing resources.
- have detailed product / service knowledge
- explain the rights and responsibilities of customers and relevant consumer law
- outline models of customer service
- explain relevant organisational procedures and standards for customer service standards and relationships.

BSBMGT401 - (Elective) Show leadership in the workplace (must do)

Unit Descriptor

This unit describes the skills and knowledge required to lead teams and individuals by modelling high standards of conduct to reflect the organisation's standards and values.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Application of the Unit

It applies to individuals who are making the transition from being a team member to taking responsibility for the work and performance of others and providing the first level of leadership within the organisation. These managers have a strong influence on the work culture, values and ethics of the teams they supervise.

Evidence Guide

Critical aspects for assessment and evidence required to demonstrate competency in this unit

The evidence required to demonstrate competency in this unit must be relevant to workplace operations and satisfy holistically all of the requirements of the performance criteria and required skills and knowledge.

Evidence of the following is essential for a participant to demonstrate competency in this unit

- identify the organisation's standards and values, whether stated or implied by the way the organisation conducts its business
- evaluate own behaviour and performance against these and adjust to achieve required standards
- develop and implement performance plans and key performance indicators (KPIs) to meet organisation's goals and objectives
- use established communication channels to raise questions about standards and values that may be damaging to the organisation
- ensure own behaviour and performance contributes to the integrity and credibility of the organisation
- facilitate processes to make decisions that are based on:
 - relevant information
 - examination of options and associated risks
 - input from relevant people

- communicate about making and implementing decisions including:
 - facilitating agreement on the preferred course of action and implementation plans
 - monitoring and feedback on the implementation and impact of decisions.
- explain how to identify an organisation's standards and values when they are:
 - stated
 - implied
- articulate organisational values and expectations of behaviour
- explain basic theory of group behaviour
- outline the organisation's process for raising questions about standards and values
- give examples of behaviours and performance that would typically be considered damaging to an organisation
- explain concepts including:
 - organisational values
 - role modelling
 - integrity and credibility
 - leadership.

BSBWOR403 - (Elective) Manage stress in the workplace (must do)

Unit Descriptor

This unit describes the skills and knowledge required to identify signs and sources of stress within job roles and according to key performance indicators (KPIs). Management strategies to aid recovery from stressful situations are also essential.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Application of the Unit

It applies to individuals who work at a managerial level, have excellent communication skills and apply knowledge of organisational policies, occupational health and safety (OHS) and other relevant legislation.

Evidence Guide

Critical aspects for assessment and evidence required to demonstrate competency in this unit

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.

Evidence of the following is essential for a participant to demonstrate competency in this unit:

- use appropriate techniques and strategies to manage own stress
- identify potential sources of fatigue or stress in the work environment
- assist team members to develop and use strategies to manage or minimise stress
- build team morale and cohesion
- monitor performance and stress levels of team members, and respond appropriately.
- describe signs and sources of stress and fatigue
- summarise stress management and reduction techniques
- summarise stamina management techniques
- explain the relationship between time management and stress
- explain the requirements under work health and safety (WHS) legislation to address workplace stress.
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BSBWOR402 - (Elective) Promote team Effectiveness

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to promote teamwork. It involves developing team plans to meet expected outcomes, leading the work team, and proactively working with the management of the organisation.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Frontline managers have an important leadership role in the development of efficient and effective work teams. They play a prominent part in team planning, supervising the performance of the team and developing team cohesion. They provide leadership for the team and bridge the gap between the management of the organization and the team members. As such they must 'manage up' as well as manage their team/s.

Evidence Guide

Critical aspects for assessment and evidence required to demonstrate competency in this unit

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.

Evidence of the following is essential for a participant to demonstrate competency in this unit:

- teamwork plan with details of how it was generated and how it will be monitored so that team goals can be met
- techniques in communicating information, dealing with team conflict and resolving issues
- Knowledge of organisational goals, objectives and plans.
- . access to appropriate documentation and resources normally used in the workplace
- analysis of responses to case studies and scenarios
- direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate
- observation of demonstrated techniques in working with team dynamics
- observation of performance in role plays
- oral or written questioning to assess knowledge of principles and techniques associated with group dynamics and processes

- evaluation of opportunities provided for input of team members into planning, decision making and operational aspects of work team
- review of feedback provided to team members
- review of teamwork plan.

BSBWOR404 - (Elective) Develop work priorities

Unit Descriptor

This unit describes the skills and knowledge required to monitor and obtain feedback on own work performance and access learning opportunities for professional development

Application of the Unit

This unit applies to individuals who are required to design their own work schedules and work plans and to establish priorities for their work. They will typically hold some responsibilities for the work of others and have some autonomy in relation to their own role.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Evidence Guide

Critical aspects for assessment and evidence required to demonstrate competency in this unit

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.

Evidence of the following is essential for a participant to demonstrate competency in this unit:

- prepare and communicate own work plan
- schedule work objectives and tasks to support the achievement of the workgroup goals
- review own work performance against workgroup objectives through self-assessment and seeking and acting on feedback from clients and colleagues
- plan and access learning opportunities to extend personal work competencies
- explain how business technology applications can be used to schedule tasks and plan work
- explain techniques to prepare personal plans and establish priorities
- identify methods to identify and prioritise personal learning needs
- outline a range of professional development options
- explain methods to elicit, analyse and interpret feedback
- provide a detailed explanation of methods that can be used to evaluate own performance.

BSBWOR401 - (Elective) Establish effective workplace relationships

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to collect, analyse and communicate information and to use that information to develop and maintain effective working relationships and networks, with particular regard to communication and representation.

Application of the Unit

Frontline managers play an important role in developing and maintaining positive relationships in internal and external environments so that customers, suppliers and the organisation achieve planned outputs and outcomes. They play a prominent part in motivating, mentoring, coaching and developing team cohesion through providing leadership for the team and forming the bridge between the management of the organisation and team members.

At this level, work will normally be carried out within routine and non routine methods and procedures, which require planning and evaluation, and leadership and guidance of others.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Evidence Guide

Critical aspects for assessment and evidence required to demonstrate competency in this unit

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.

Evidence of the following is essential for a participant to demonstrate competency in this unit:

- range of methods and techniques for communicating information and ideas to a range of stakeholders
- range of methods and techniques for developing positive work relationships that build trust and confidence in the team
- accessing and analysing information to achieve planned outcomes
- techniques for resolving problems and conflicts and dealing with poor performance
- knowledge of the theory associated with managing work relationships to achieve planned outcomes

BSBCUS301 - (Elective) Deliver and monitor a service to customers

Unit Descriptor

This unit describes the skills and knowledge required to identify customer needs, deliver and monitor customer service and identify improvements in the provision of customer service.

Application of the Unit

It applies to individuals who apply a broad range of competencies in various work contexts. In this role, individuals often exercise discretion and judgement using appropriate theoretical knowledge of customer service to provide technical advice and support to customers over short or long term interactions.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Evidence Guide

Critical aspects for assessment and evidence required to demonstrate competency in this unit

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.

Evidence of the following is essential for a participant to demonstrate competency in this unit:

- 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.
- 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.

BSBCUE309 - (Elective) Develop product and service knowledge for customer engagement operation

Unit Descriptor

This unit describes the skills and knowledge required to develop knowledge of products and services in preparation for customer engagement in an inbound or outbound customer engagement activity.

Application of the Unit

It applies to individuals who apply a broad range of competencies in a varied work context, using some discretion and judgement and relevant theoretical knowledge, and who may provide technical advice and support to a team. This work is undertaken with some supervision and guidance.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Evidence Guide

Critical aspects for assessment and evidence required to demonstrate competency in this unit

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.

Evidence of the following is essential for a participant to demonstrate competency in this unit:

- 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
- 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.

BSBMGT403 - (Elective Implement continuous improvement

Unit Descriptor

This unit describes the skills and knowledge required to implement the organisation's continuous improvement systems and processes. It covers using systems and strategies to actively encourage the team to participate in the process, monitoring and reviewing performance, and identifying opportunities for further improvements.

Application of the Unit

It applies to managers who have an active role in implementing the continuous improvement process to achieve the organisation's objectives. Their position is closely associated with the creation and delivery of products and services which means that they have an important role in influencing the ongoing development of the organisation.

At this level, work will normally be carried out within routine and non-routine methods and procedures, which require planning, evaluation, leadership and guidance of others.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Evidence Guide

Critical aspects for assessment and evidence required to demonstrate competency in this unit

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.

Evidence of the following is essential for a participant to demonstrate competency in this unit:

- implement continuous improvement systems and provide mentoring and coaching support to enable individuals and teams to participate in decisions, take responsibility, show initiative and implement improvement processes
- implement processes to inform team members about savings and productivity/service improvements achievements
- communicate effectively to support the continuous improvement system and implementation of improvements
- apply continuous improvement to customer services including internal and external customers
- implement, monitor and adjust improvement plans, processes and procedures to improve performance
- document performance to identify further opportunities for improvement
- manage records and reports within the organisation's systems and procedures.