

Training Package	Business Services (BSB01)	HSC Requirements and Advice
Title:	Provide information to clients	
Unit Code	Unit Descriptor:	HSC Indicative Hours: 15
BSBCM209A	This unit covers the skills and knowledge required to greet clients and determine their needs in accordance with the organisation's requirements. This unit is related to BSBCM309A Recommend products and services.	

Context/s of Assessment	Critical aspects of Evidence	Consistency of Performance	Resource Implications	HSC Requirements and Advice
<ul style="list-style-type: none"> - Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement - Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package - Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment - Assessment should reinforce the integration of the key competencies and the Business Services Common Competencies for the particular AQF Level. Refer to the Key Competency Levels at the end of this unit 	<ul style="list-style-type: none"> - Application of organisational requirements for responding to client enquiries and promoting products and services - Visitors or telephone enquiries are greeted promptly and politely - Correct and current information about the organisation's products and services is provided 	<p>In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations</p>	<p>The learner and trainer should have access to appropriate documentation and resources normally used in the workplace</p>	<p>Key Terms and Concepts:</p> <ul style="list-style-type: none"> - client - professional and courteous manner - interpersonal skills - sensitivity - enquiry - appropriate questioning techniques - active listening - goals - objectives - Business Plan - guideline - policy - body language - summarise - paraphrase - confirmation - clarify - cultural diversity

Element of Competency	Performance Criteria	Range Statement	Evidence Guide	HSC Requirements and Advice
1. Establish contact with clients	1.1 Communication with <i>clients</i> is conducted in a professional and courteous manner according to <i>organisational requirements</i>	<p>Legislation, codes and national standards relevant to the workplace which may include:</p> <ul style="list-style-type: none"> - award and enterprise agreements and relevant industrial instruments - relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination - relevant industry codes of practice <p>Clients may be:</p> <ul style="list-style-type: none"> - internal or external - other agencies - individual members of the organisation - individual members of the public <p>Organisational requirements may be included in:</p> <ul style="list-style-type: none"> - goals, objectives, plans, systems and processes - business plans - Occupational Health and Safety policies, procedures and programs - legal and organisation policy/guidelines and requirements - access and equity principles and practice - quality and continuous improvement processes and standards - job description - defined resource parameters 	<ul style="list-style-type: none"> • Knowledge <p>* At this level the learner must demonstrate basic operational knowledge in a moderate range of areas.</p> <ul style="list-style-type: none"> - The relevant legislation from all levels of government that affects business operation, especially in regard Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination - Understanding of organisation's business values, structure, products and services - Types of resources available within the organisation and how to access them - Organisational policies and procedures relating to client service - Techniques of oral and written communication - Telephone techniques <ul style="list-style-type: none"> • Skills <ul style="list-style-type: none"> - Questioning and active listening skills to identify client requests - Communication skills for conveying meaning clearly, concisely and coherently - Client service skills in relation to giving and receiving information - Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities 	<p>Learning experiences for the HSC must address:</p> <p>Business values can be reflected in:</p> <ul style="list-style-type: none"> - mission statement - vision - goals - objectives <p>Communication via:</p> <ul style="list-style-type: none"> - telephone - in person - written (letters, email) - fax
	1.2 Personal dress and presentation is maintained in line with organisational requirements			<p>Learning experiences for the HSC must address:</p> <p>Variations in dress and presentation according to enterprise:</p> <ul style="list-style-type: none"> - dress code - uniforms
	1.3 Appropriate <i>interpersonal skills</i> are used to facilitate accurate and relevant exchange of information	<p>Interpersonal skills may include:</p> <ul style="list-style-type: none"> - using appropriate body language - summarising and paraphrasing to check understanding of client's message - providing an opportunity for the client to confirm their request - questioning to clarify and confirm the client's needs - listening actively to what the client is communicating 		<p>Learning experiences for the HSC must address:</p> <p>Effective communication skills including:</p> <ul style="list-style-type: none"> - questioning techniques - active listening - body language
	1.4 All work reflects <i>sensitivity</i> to client's specific needs and any cultural, family and individual differences	<p>Sensitivity may include</p> <ul style="list-style-type: none"> - respect for diversity - understanding how other people feel 		

Element of Competency	Performance Criteria	Range Statement	Evidence Guide	HSC Requirements and Advice
2. Respond to client enquiry	2.1 Client <i>enquiries</i> are responded to promptly and politely and in accordance with organisational requirements	<p>Responding to enquiries may include:</p> <ul style="list-style-type: none"> - arranging appointments - information about products or services - general information - referrals to other colleagues/departments - clarifying or resolving problems <p>Enquiries may be made through:</p> <ul style="list-style-type: none"> - face-to-face, email, fax, telephone 	<ul style="list-style-type: none"> • Knowledge <p>* At this level the learner must demonstrate basic operational knowledge in a moderate range of areas.</p> <ul style="list-style-type: none"> - Understanding of organisation's business values, structure, products and services - Types of resources available within the organisation and how to access them - Organisational policies and procedures relating to client service - Organisational structure and role of the members of the organisation - Techniques of oral and written communication - Telephone techniques <ul style="list-style-type: none"> • Skills <ul style="list-style-type: none"> - Questioning and active listening skills to identify client requests - Communication skills for conveying meaning clearly, concisely and coherently - Client service skills in relation to giving and receiving information - Problem solving skills to deal with client enquiries or complaints - Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities 	<p>Learning experiences for the HSC must address:</p> <p>Factors promoting enterprise including:</p> <ul style="list-style-type: none"> - presentation - knowledge - efficiency - how to handle clients and enquiries <p>Responding to enquiries involves:</p> <ul style="list-style-type: none"> - arranging appointments - information about products or services - general information - referrals to other colleagues/departments - clarifying or resolving problems <p>Enquiries are made:</p> <ul style="list-style-type: none"> - face-to-face - email - fax - telephone <p>Anticipating problems</p> <p>Clarifying and recording details</p>
	2.2 Appropriate questioning and active listening are used to determine client needs		<p>Learning experiences for the HSC must address:</p> <p>Establishing the details of enquiry by questioning and summarising eg active listening, open, closed and reflective questions</p>	
	2.3 Telephone calls are answered and made in accordance with organisational requirements		<p>Learning experiences for the HSC must address:</p> <p>Effective telephone technique:</p> <ul style="list-style-type: none"> - clear and concise language - voice tone and volume - appropriate greeting 	
	2.4 Information relevant to client needs is provided in line with organisational requirements			

Element of Competency	Performance Criteria	Range Statement	Evidence Guide	HSC Requirements and Advice
	2.5 Enquiries outside area of responsibility/ knowledge are referred to <i>nominated person/s</i> for resolution	Nominated persons may include: - those who have the relevant knowledge and authority to exercise the responsibility		Learning experiences for the HSC must address: Referring to nominated persons including: - peers/colleagues - supervisor - department managers
	2.6 Additional information or follow-up action is completed in line with client needs and organisational timelines			Learning experiences for the HSC must address: Follow up when nominated person is not available via: - telephone call - email - letter - personal visit Clarifying and discussing problems Implementing solutions within acceptable time lines

Key Competency Levels

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 1	Level 1	Level 1	Level 1	Level 1	Level 1	Level 1

Three levels of performance denote level of competency required to perform task.

1. Perform 2. Administer 3. Design

- **Collecting, analysing and organising information** – to monitor and report on client services
- **Communicating ideas and information** – with clients on products and services
- **Planning and organising activities** – to meet client needs
- **Working with teams and others** – in completing scheduled tasks
- **Using mathematical ideas and techniques** – to respond to client enquiry
- **Solving problems** – to respond to client enquiries or complaints
- **Using technology** – to complete allocated tasks

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies