CATAPULT

CPPCMN4004

Develop and manage client relations

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Trainer/assessor guide

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Develop and manage client relations

Welcome to this unit of study

This unit of competency specifies the outcomes required to establish business contacts and networks, and develop and manage these relationships effectively to increase and retain the client base of the company. The unit covers identifying and analysing potential clients and their needs. It also covers exploring products or services with the client that could improve or enhance their operations, which requires knowledge of the range of organisational products and services. The unit involves managing client problems, issues and changing needs; and identifying opportunities to promote additional products and services to meet those needs.

The unit supports those with significant contact with external clients but without managerial or supervisory responsibilities. It applies to those providing information on routine, well-defined products and services, and dealing with enquiries of a more complex nature, including pricing. Performance would usually be carried out under routine supervision, within company guidelines.

It may be undertaken as:
›› part of a formal qualification nationally recognised through the Australian Qualifications Framework (AQF)
›› a stand alone unit
›› part of a formal skill set

Contents

About this trainer/assessor guide

Learning resource

The learning resource is divided into the following topics:

- Establish new business contacts
- Work effectively with business contacts
- Identify and monitor client needs
- Respond to complex client needs
- Communicate advice and pricing information
- Promote company

Each topic provides information to help you gain the skills and knowledge required to perform the work tasks to which they refer. Read the information and practise the skills described. You should also take the opportunity to undertake additional independent research. Your trainer/assessor may also provide supplementary information including interpretation of the contents of this resource.

At the end of each topic is:

- a set of true or false questions
- a set of multiple choice questions

These questions provide an opportunity to check your understanding and progress. They are self-marking and do not form part of the assessment for the unit.

Assessment workbook

To have this unit recognised as a formal qualification you need to have your skills and knowledge assessed. The assessment workbook provides:

- information on competency-based assessment
- instructions on how you will be assessed
- assessment tools to assess your competence
- instructions on how to complete the assessment tasks within each assessment tool

To be assessed as competent you need to provide evidence that you have the skills and knowledge to undertake the requirements of this unit. This assessment of competency is made by a qualified trainer/assessor from a registered training organisation. You must complete all the assessments as directed by your trainer/assessor to the required standard. It is not necessary to work through the guide in the order in which it is written. However this is at the discretion of your trainer/assessor.

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