



Australian Government

Department of Education, Employment and Workplace Relations

CPPDSM3019B Communicate with clients as part of agency operations

Release: 1

CPPDSM3019B Communicate with clients as part of agency operations

Modification History

Not Applicable

Unit Descriptor

Unit descriptor

This unit of competency specifies the outcomes required to interact and build relationships with clients as part of agency operations. It includes developing rapport with clients, handling initial client enquiries, establishing and maintaining a client database and dealing with client complaints and problems.

The unit may form part of the licensing requirements for persons engaged in real estate activities in those States and Territories where these are regulated activities.

Application of the Unit

Application of the unit

This unit of competency supports the work of licensed real estate agents, real estate representatives and support staff in interacting and building effective relationships with clients as part of agency operations.

Licensing/Regulatory Information

Refer to Unit Descriptor

Pre-Requisites

Prerequisite units Nil

Employability Skills Information

Employability skills The required outcomes described in this unit of competency contain applicable facets of employability skills. The Employability Skills Summary of the qualification in which this unit of competency is packaged, will assist in identifying employability skills requirements.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.

Performance criteria describe the required performance needed to demonstrate achievement of the element. Where ***bold italicised*** text is used, further information is detailed in the required skills and knowledge and/or the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT

PERFORMANCE CRITERIA

- | | |
|--|---|
| 1 Establish rapport with clients. | <ul style="list-style-type: none">1.1 Rapport with <i>client</i> is established and an interest in <i>client needs, preferences and requirements</i> is expressed to enhance client commitment and trust and credibility of agency, and build return client base.1.2 <i>Professional ethics are maintained with the client</i> to promote agency image and credibility.1.3 <i>Effective communication strategies</i> are employed to assist in establishing rapport with client. |
| 2 Handle initial client enquiries. | <ul style="list-style-type: none">2.1 <i>Client needs, preferences and requirements are accurately clarified</i> to maximise opportunities to promote <i>agency services</i>.2.2 Client is given space and time to evaluate agency services, while time is used to maximum advantage for client and agency.2.3 Client is provided with accurate, initial information on agency services in line with client needs, agency practice and legal requirements.2.4 Features and benefits of agency services are explained to client.2.5 Interview appointment time is arranged where necessary and interview preparations are completed.2.6 Formal and informal information is gathered and appropriate notes are taken for file. |
| 3 Maintain and use client database. | <ul style="list-style-type: none">3.1 Client confidentiality is maintained as required by agency practice and legal requirements.3.2 <i>Client database</i> is accurately developed, regularly maintained and securely stored according to agency policies and procedures.3.3 Regular clients are accurately identified and followed up according to agency practice.3.4 <i>Client records</i> are accurately used to advise clients on agency services of possible interest. |
| 4 Deal with client complaints and problems. | <ul style="list-style-type: none">4.1 <i>Client complaints and problems</i> are acknowledged and client is supported reassuringly to produce positive outcome.4.2 Client is encouraged to verbalise issues and active listening is used to minimise client frustration.4.3 Client's confidence in agency is developed to promote long-term commitment and trust.4.4 Mutually acceptable resolution of complaint or problem is achieved through implementing agency |

ELEMENT**PERFORMANCE CRITERIA**

policy and procedures.

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the essential skills and knowledge and their level, required for this unit.

Required skills:

- ability to communicate and relate to a range of people from diverse social, economic and cultural backgrounds and with varying physical and mental abilities
- analytical skills to identify and clarify client needs, preferences and requirements
- application of risk management strategies associated with handling initial enquiries from clients
- computing skills to access agency databases, send and receive emails and complete standard forms online
- decision making and problem solving skills to apply ethical standards and deal with client complaints and problems
- literacy skills to access and interpret a variety of texts, including agency policy and procedures; record appointment details; take notes for files; and complete standard forms
- numeracy skills to perform basic calculations associated with the scheduling of appointments and meetings
- planning, organising and scheduling skills to make appointments for clients
- research skills to identify and locate information on agency database and printed information held by industry and community groups
- use of telephone systems.

Required knowledge and understanding:

- agency record keeping requirements
- agency client service goals and objectives
- agency services, including:
 - features and benefits
 - types
- client complaints and problems, including:
 - strategies for resolving conflicts
 - types
- client database
- client needs, preferences and requirements

REQUIRED SKILLS AND KNOWLEDGE

- diary systems
- effective communication, including principles of and barriers to effective communication
- ethical standards, including:
 - confidentiality
 - honesty
 - privacy
- file notes
- relevant federal, and state or territory legislation and local government regulations relating to:
 - anti-discrimination and equal employment opportunity
 - consumer protection
 - environmental issues
 - financial probity
 - franchises and business structure
 - industrial relations
 - OHS
 - property sales, leasing and management
- risks and risk management strategies
- software applications, including:
 - database
 - email
 - internet
 - word processing
- types of clients
- work organisation techniques, including:
 - prioritising workload to deal effectively with clients and enquiries
 - preparing information
 - timing and scheduling of appointments.

Evidence Guide

EVIDENCE GUIDE

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, the range statement and the Assessment Guidelines for this Training Package.

- Overview of assessment**
- This unit of competency could be assessed through practical demonstration of establishing rapport with a

client, handling an initial client enquiry, establishing and maintaining a client database and dealing with client complaints and problems in the context of agency operations. Targeted written (including alternative formats where necessary) or verbal questioning to assess the candidate's underpinning knowledge would provide additional supporting evidence of competence. The demonstration and questioning would include collecting evidence of the candidate's knowledge and application of ethical standards and relevant federal, and state or territory legislation and regulations. This assessment may be carried out in a simulated or workplace environment.

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

A person who demonstrates competency in this unit must be able to provide evidence of:

- applying agency policies and procedures, and relevant legislative requirements in regard to dealing with clients
- applying knowledge of agency services to enhance client support
- developing client commitment to agency and building return custom by establishing rapport and a relationship with client, maintaining professional ethics, and accurately discerning client needs, requirements and preferences
- establishing and maintaining client records and details, maintaining client confidentiality, ensuring secure storage of client records and using client records to maximise client interest in agency services
- resolving client complaints by acknowledging problems and supporting client in arriving at positive outcomes and obtaining mutually acceptable complaint resolution
- using effective questioning, listening and observation skills to determine client requirements accurately.

Context of and specific resources for assessment

Resource implications for assessment include:

- access to suitable simulated or real opportunities and resources to demonstrate competence
- assessment instruments that may include personal planner and assessment record book
- access to a registered provider of assessment services.

Where applicable, physical resources should include equipment modified for people with disabilities.

Access must be provided to appropriate learning and/or assessment support when required.

Assessment processes and techniques must be culturally

appropriate, and appropriate to the language and literacy capacity of the candidate and the work being performed.

Validity and sufficiency of evidence require that:

- competency will need to be demonstrated over a period of time reflecting the scope of the role and the practical requirements of the workplace
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the person's competence
- all assessment that is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through simulated project-based activity and must include evidence relating to each of the elements in this unit.

In all cases where practical assessment is used it will be combined with targeted questioning to assess the underpinning knowledge. Questioning will be undertaken in such a manner as is appropriate to the language and literacy levels of the candidate and any cultural issues that may affect responses to the questions, and will reflect the requirements of the competency and the work being performed.

Range Statement

RANGE STATEMENT

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. ***Bold italicised*** wording in the performance criteria is detailed below. Add any essential operating conditions that may be present with training and assessment depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts.

Clients may include:

- buyer's agent
- buyers
- landlords

Client needs, preferences and requirements may include:

- people from a range of social, cultural or ethnic backgrounds and with varying physical and mental abilities
- property developers
- regular and new customers
- sellers
- tenant's agent
- tenants.
- contract administration
- current and planned real estate developments
- information about agency services in relation to specific property
- lease enquiries
- physical needs
- property characteristics, including:
 - availability of alternative energy sources
 - accessibility for people with disabilities
 - energy efficiency
 - energy ratings
 - water saving devices
- property management
- property sales.

Professional ethics maintained with the client may include:

- confidentiality
- honesty
- positive statements
- privacy.

Effective communication strategies may include:

- active listening
- being non-judgemental
- exploring problems
- expressing an individual perspective
- providing sufficient time for questions and responses
- providing summarising and reflective responses in conflict situations
- using appropriate words, behaviour and posture
- using clarifying and summarising questions
- using clear and concise language
- using culturally appropriate communication
- using plain English
- using verbal and non-verbal communication.

Client needs, preferences and requirements are accurately clarified

- active listening
- appropriate questioning
- empathy

through using:

- observation
- reassurance and confirmation.

Agency services may include:

- property management
- property sales.

Client database may be:

- computer-based
- manual.

Client records may include:

- contact details
- name
- nature of enquiry or requirement
- request for follow-up and promotional information.

Client complaints and problems may relate to:

- agency service
- client behaviour, including:
 - aggressive behaviour
 - arrogant behaviour
 - assertive behaviour
 - demanding behaviour
 - exasperated behaviour
 - fussy behaviour
 - passive behaviour
 - rude behaviour
- property sales
- property management.

Unit Sector(s)

Unit sector

Property development, sales and management

Competency field

Competency field

Real estate