SKILLSIQ

CAPABLE PEOPLE MAKE CLEVER BUSINESS

Cross-Sector: Consumer Engagement via Online and Social Media

Case for Endorsement

SIR Retail Services
Training Package V4.0

June 2019

Contents

A. Administrative details of the Case for Endorsement

Name of allocated Industry Reference Committee (IRC)	Wholesale and Retail IRC
Name of the Skills Services Organisation (SSO)	SkillsIQ Limited
Case for Change reference	Final Case for Change: Consumer Engagement via Online & Social Media (Cross-Sector Project) Activity Order reference: SkillsIQ-AA/2016−17/001 executed 27 June 2017
Case for Endorsement reference	Activity Order reference: SkillsIQ/TPD _ online social media CSP/2017-18/002. **Category B** – Develop a new Training Package, Qualification or Unit of Competency **Category C** – Update a Training Package, Qualification, Skill Set or Unit of Competency **Category D** – Preparation of training products or materials to support the implementation of Training Packages.

Title and code for each of the Training Package Products that are submitted for approval.
This Case for Endorsement seeks the approval of new cross-sector Training Package Products which are to be included in the SIR Retail Services Training Package, inclusive of:

- **Four Skill Sets:**
    - SIRSS00018 Understand the use of social media for business purposes Skill Set
    - SIRSS00019 Implement social media and online customer engagement Skill Set
    - SIRSS00020 Manage and implement social media and online customer engagement Skill Set
    - SIRSS00021 Develop an online presence for customer engagement Skill Set.

- **Seven Units of Competency:**
    - SIRXOSM001 Identify and review social media and online platforms for organisational use
    - SIRXOSM002 Maintain ethical and professional standards when using social media and online platforms
    - SIRXOSM003 Use social media and online tools
    - SIRXOSM004 Analyse performance of social media and online business tools
    - SIRXOSM005 Develop a basic website for customer engagement
    - SIRXOSM006 Develop and manage social media and online strategies
    - SIRXOSM007 Manage risk to organisational reputation in an online setting.

A list of proposed Training Package Products can be found also in **Appendix A: List of Training Package Products proposed for endorsement.**

B. Description of work and request for approval

Description of work undertaken and why

The Australian Industry and Skills Committee (AISC) identified a number of cross-sector areas for the development of common Training Package Products to address common skills needs identified in Industry Skills Forecasts. This project led by SkillsIQ focussed on the cross-sector area: *Consumer Engagement via Online & Social Media*.

The aim of the project was to:

○ identify the common skills needs of industries in relation to consumer engagement through **online & social media** *(Phase 1)*; and

○ inform the update and/or **development of future Training Package Products** to ensure skills training is in line with workforce needs *(Phase 2)*.

Why focus on online and social media skills?

- 14.7 million broadband internet subscribers
- 27.0 million mobile handset subscribers
- 15 million monthly active users of Facebook
- 9 million monthly active users of Instagram
- 6.4 million monthly active users of Snapchat
- 4.7 million monthly active users of Twitter
- On average, only 51.1% of businesses have a web presence and 40.4% a social media presence.

Online and social media use is embedded in the everyday lifestyles of Australians and a gap is emerging between consumer expectations and service delivery of businesses due to workforce skills gaps.
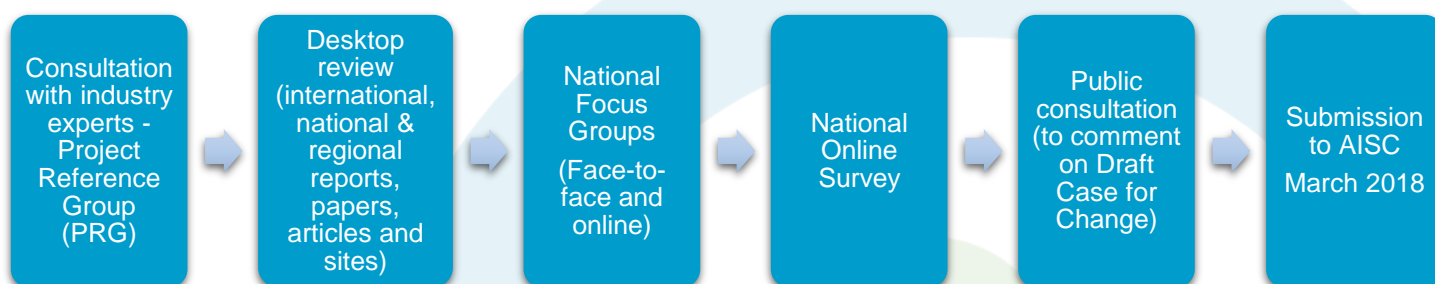**Skills training is needed and relevant for multiple job roles and industries.**

Source: Australian Bureau of Statistics (ABS) *Internet Activity, Australia, June 2018.* cat. no. 8153.0; Social Media News (2019) *Social Media Statistics Australia – January 2019*.

Phase 1 – Identifying skills needs

A Project Reference Group (PRG) comprising representatives of 16 Industry Reference Committees (IRCs) was established to take forward *Phase 1* and provide industry advice to inform consultation. An extensive multi-channel consultation process was conducted from November 2017 to February 2018 (see **Figure 1**) to gather views from a range of stakeholders across multiple industries in each state and territory.

The findings of *Phase 1* are available in the Final Case for Change: Consumer Engagement via Online & Social Media (Cross-Sector Project)**.**

Figure 1: Work conducted during Phase 1 and development of final Case for Change

Consultation with industry experts - Project Reference Group (PRG) → Desktop review (international, national & regional reports, papers, articles and sites) → National Focus Groups (Face-to-face and online) → National Online Survey → Public consultation (to comment on Draft Case for Change) → Submission to AISC March 2018

Phase 1 identified specific skills gaps and the consultation confirmed that there is overwhelming support for training in skills to conduct online and social media consumer engagement across all industries.

Phase 2 – Training Package Product development

To take forward Training Package Product development work (*Phase 2*), a new PRG was appointed. Representation on the PRG was based on including one member from each IRC responsible for those existing Units of Competency identified for review in the Case for Change, as well as include representation from those industries with high use and engagement via online and social media platforms (i.e. Culture and Related Industries and Sport and Recreation).

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New Units of Competency and Skill Sets were developed to meet the skills gaps and priorities identified in *Phase 1*. **Figure 2** outlines the stages of development involved.

Figure 2: Work conducted during Phase 2 and development of Case for Endorsement
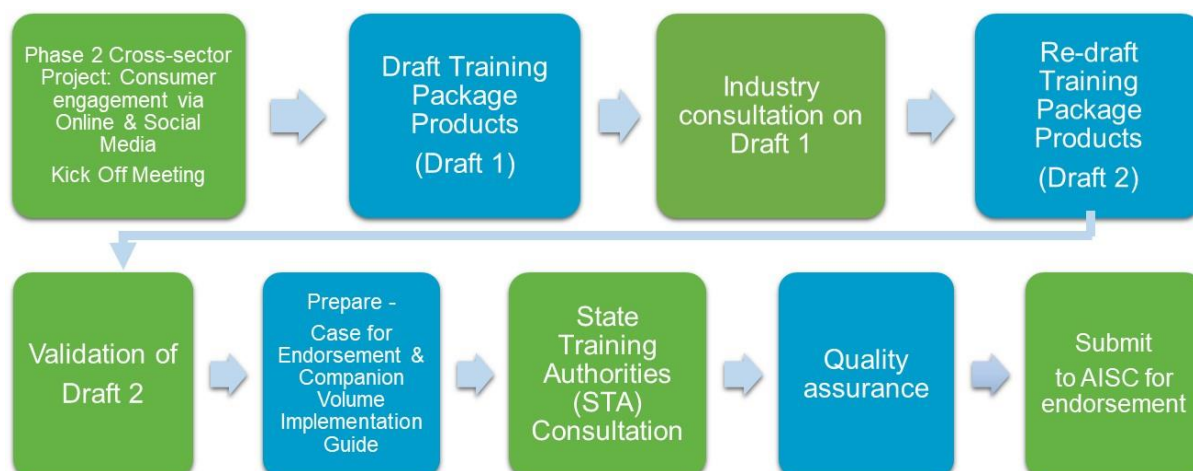
Draft 1 industry consultation was conducted from 30 October 2018 to 3 December 2018.

Draft 2 industry validation was conducted 13 March 2019 to 5 April 2019.

SkillsIQ undertook a number of national workshops, webinars and interviews to engage industry stakeholders and VET professionals and review and comment on Draft 1 and Draft 2 Training Package Products.

Impact of consultations

As a result of stakeholder feedback provided during public consultations, a number of changes were implemented to the suite of Training Package Products. Table 1 and 2 outline the transition of main changes applied (where required) to the Skill Sets and Units of Competency in response to consultation feedback. Please note minor amendments to the content of some of the Training Package Products (e.g. Elements, Performance Criteria, Performance Evidence, Knowledge Evidence etc.) were also applied in Draft 2 and these amendments are available in the *Draft 2 Validation Guide* – a document summarising the main changes implemented to Draft 1 to develop Draft 2 across individual Units of Competency and Skill Sets.

Table 1: Overview of changes across Draft versions – Cross-sector Consumer engagement via online and social media Skills Sets

Skill Set (Draft 1)	Skill Set (Draft 2)	Skill Set (FINAL)
Introduction to social media and online business tools	*[Change of title]* Understand the use of social media for business purposes	*Same as Draft 2*
Social media implementation	*[Change of title]* Implement social media and online customer engagement	*Same as Draft 2*
Engage customers through social media and online presence	*[Change of title]* Manage and implement social media and online customer engagement	*Same as Draft 2*
Develop an online presence for customer engagement	Develop an online presence for customer engagement	*Same as Draft 2*

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Table 2: Summary of changes across Draft versions – Cross-sector Consumer engagement via online and social media Units of Competency

Units of Competency (Draft 1)	Units of Competency (Draft 2)	Units of Competency (FINAL)
Use information and computer technology	*[Discontinuation as part of the Cross-sector suite of Training Package Products]*	-
Identify social media and online platforms	Identify social media and online platforms	*Same as Draft 2*
Maintain ethical and professional standards when working online	*[Change of title]* Maintain ethical and professional standards when using social media and online platforms	*Same as Draft 2*
Use social media and online tools	Use social media and online tools	*Same as Draft 2*
Analyse performance of social media and online business tools	Analyse performance of social media and online business tools	*Same as Draft 2*
Develop a basic website	*[Change of title]* Develop a basic website for customer engagement	*Same as Draft 2*
Develop and manage social media and online strategies	Develop and manage social media and online strategies	*Same as Draft 2*
Manage risk to organisational reputation in an online setting	Manage risk to organisational reputation in an online setting	*Same as Draft 2*

In general, the feedback received was positive. One stakeholder commented it was '*an intelligent training package*', and others indicated the Training Package Products offered '*transferable skills*' and were '*covering the most important aspects*' in relation to online and social media use for business purposes. There was a general consensus of the value of training for developing online and social media skills and that these cross-sector Training Package Products are considered relevant for a wide range of industries.

Overall the feedback across the suite of Training Package Products was positive and support for their cross-sectoral application is strong.

"These skill sets and units are long overdue and shall be very beneficial to a growing industry."

"The units of study themselves are pretty good. They are useful and relevant. In my professional opinion, as far as VET goes, this is pretty on the mark!"

Some general points of enquiry raised during the consultation for consideration

During the consultations, stakeholders raised a number of issues as outlined and addressed below:

Key considerations	Comment
Discontinuing with the Unit of Competency - *Use information and computer technology*	➢ Feedback acknowledged the importance of having basic skills in digital literacy and internet usage prior to using online and social media for customer engagement, however existing Training Package Products were considered suitable to meet this skill need for cross-sectoral application. In response to the feedback and discussions held by the PRG, this Training Package Product was discontinued from the suite.
Implementation Key questions were raised including *How will cross-sector units be housed? Which Training Package will it sit in? How will these Training Package products be adopted?*	➢ Stakeholders were informed that this was currently being reviewed by the Department of Education and Training, and the AISC, and once a process was confirmed, industry would be notified accordingly. ➢ In the interim, this cross-sector project, and the respective suite of Training Package Products, had been allocated by the AISC to the Wholesale and Retail Industry Reference Committee (IRC) as lead IRC. ➢ The Department of Education and Training recently released an *IRC Operating Protocol for cross-sector projects* outlining formal governance and implementation arrangements. It was put forward to the AISC for endorsement in April 2019. ➢ Cross-sector online and social media Units of Competency and Skill Sets have been housed with the SIR Retail Services Training Package so they can be immediately available for implementation. An explanation of their cross-industry applicability has been provided within the Companion Volume Implementation Guide.
Orphan Units Some stakeholders indicated that units needed to be listed within a qualification during development and endorsement phases. Linking units to other skills and knowledge areas and job roles is recommended to provide context and facilitate importing for use.	➢ All seven Units have been housed, as electives, within appropriate AQF level qualifications from Certificate II through to Diploma in the SIR Retail Services Training Package. ➢ The Companion Volume Implementation Guide provides advice and guidance to support the import and application of cross-sector units across Training Packages and qualifications.

Duplication of existing Training Package Products
 	
Some cross-sector products were perceived to cover skills and knowledge areas already covered by existing Training Package products. A number of existing products in the ICT and BSB Training Packages were referenced.
	➢ While certain existing Units covered *some* skill and knowledge requirements for customer engagement via online & social media platforms, few had been written with this specific context in mind.
	➢ Exiting Units reviewed were not considered suitable for the purposes of this project as they are:
	  ○ written with a slant towards a specific industry (e.g. they cover highly technical coding skills for ICT); or
	  ○ are very expansive having been written during an era when social media was emerging; or
	  ○ describe a generic business skill (e.g. managing business risk), without any specific content related to use of social media and online platforms.

Final Project Outcome →	**A suite of generic Cross-Sector Training Package Products** that will deliver the future skills training needs of multiple industries regarding conducting consumer engagement via online and social media in the workplace.

Decision being sought from the AISC

SkillsIQ, under the direction of the Cross-sector PRG and the Wholesale and Retail IRC, is seeking that the Training Package Products, listed in **Appendix A: List of Training Package Products proposed for endorsement,** be endorsed by the AISC and approved for release on the national training register, www.training.gov.au.

C. Evidence of industry support

Written evidence of support by the IRC(s) responsible for the relevant Training Package Products.

Given the cross-sectoral nature of the Training Package Products being developed, a Project Reference Group (PRG) representing multiple industries to guide the development of Products was formed. Letters of support have been provided by PRG members, and additional letters will be sought from members of the lead IRC, Wholesale and Retail IRC, when signing off for inclusion in the submission.

Letters of support from industry stakeholders are available at **Appendix B: Letters of support.**

Evidence of consultation with all relevant stakeholders.

Training Package Product development was led by the cross-sector Online & Social Media PRG and overseen by the Wholesale and Retail IRC as the appointed lead IRC. A list of PRG and IRC members can be found at **Appendix C: Wholesale and Retail IRC and Project Reference Group membership.**

National consultation on Draft 1 and Draft 2 were conducted during:

- 30 October 2018 to 3 December 2018 (Draft 1 consultation)
- 13 March 2019 to 5 April 2019 (Draft 2 validation).

The consultations and Training Package Products were promoted across:

- SkillsIQ's networks and stakeholders (representing more than 15,000 contacts)
- Project Reference Group (PRG) members' networks
- Other Skills Service Organisation (SSO) for distribution to their Industry Reference Committees (IRCs) and stakeholders.
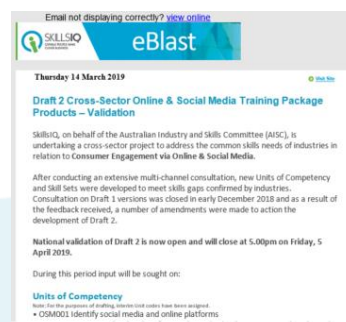
SkillsIQ undertook a number of national workshops, webinars and interviews to engage industry stakeholders and VET professionals and review and comment on Draft 1 and Draft 2 Training Package Products. To ensure consultation and validation considered the needs of all interested groups and ensured inclusivity, teleconferences and webinars were offered to ensure national access, and more specifically access for those operating in remote or regional areas.

In total, 10 webinars and three face-to-face workshops were conducted across Australia. In addition, draft Training Package Products were available for comment through SkillsIQ's online Feedback Forum. Additional documentation supplied via the online Feedback Forum to support Training Package Product reviews included a:

- *Draft 1 Consultation Guide* – summarising the proposed products and other project details,

- *Draft 2 Validation Guide* – summarising the main changes implemented to Draft 1 to develop Draft 2 across individual Units of Competency and Skill Sets.

The Feedback Forum received **567 unique views during the Draft 1** consultation period and **415 unique views during the Draft 2** validation period.

A complete list of stakeholders who participated in the consultations can be found at **Appendix D: Stakeholder consultation and engagement list**. Stakeholders represented a range of industries and organisation types:

- Employers – small, medium and large businesses
- Education providers and Educators – Registered Training Organisations (RTOs), Universities
- Social Media Practitioners and Strategists
- Peak associations and bodies from various industries
- Resource developers
- Government agencies
- Industry Skills Advisory Councils.

Feedback was received from all jurisdictions across Australia.

Table 3: Training Package Product development process and industry consultation

Project Stage	Details
Scoping – Case for Change development November 2017 – March 2018	SkillsIQ coordinated a number of consultation activities, including national workshops, webinars, interviews and a national online survey widely distributed to ascertain the specific skills needs and gaps in relation to conducting consumer engagement via online and social media. A Case for Change was submitted in March 2018.
Training Package Product development Drafting (Draft 1) October 2018	Draft 1 was developed based on the outcomes from scoping activities and ongoing input from key industry stakeholders. The PRG was key in informing this development work. Draft 1 was finalised in October 2018.
Consultation and Feedback October – December 2018	SkillsIQ worked with PRG members and key stakeholders to conduct a range of consultation activities and seek feedback on proposed Training Package Products. The consultation period was promoted through SkillsIQ's communication channels inclusive of social media, news blasts and targeted emails. Stakeholder groups promoted this consultation through their networks. Consultation activities, a national workshops, webinars and interviews to engage industry stakeholders and VET professionals.

Project Stage	Details
	In addition to the above activities, stakeholders had an opportunity to provide feedback via SkillsIQ's Online Feedback Forum.
Drafting (Draft 2) December 2018 – February 2019	Feedback received during the consultation period informed the development of Draft 2. Draft 2 was finalised based on the PRG's discussions and decisions.
Validation March – April 2019	Draft 2 was made available for validation online via SkillsIQ's Online Feedback Forum. The validation period was promoted across SkillsIQ's communication channels inclusive of social media, news blasts and targeted emails.
Drafting (Final Draft) April 2018	Feedback received during the Draft 2 validation period informed the development of the Final Draft. Final draft Training Package Products have been included in this Case for Endorsement.
Quality Assurance April- May 2019	The Final Draft Training Package Products will undergo an independent quality assurance review to confirm compliance with: • Standards for Training Packages 2012 • Training Package Products policy • Training Package development and endorsement process policy.
Submission May 2019	Submission to the Australian Industry and Skills Committee (AISC) for endorsement consideration.

Cross-sectoral consultation

Due to the cross-sectoral nature and application of these Training Package Products, gathering feedback from a cross-range of industries was essential during the development process. Mechanisms and processes used to ensure a cross-range of industries were informed of, and participated in, the development phase included:

- Establishing a PRG with members from a diverse range of industries:

  - Business Services
  - Community Sector and Development
  - Culture and Related Industries
  - Education and Training
  - Information and Communications Technology (ICT)
  - Manufacturing and Engineering
  - Sport and Recreation
  - Tourism, Travel and Hospitality
  - Wholesale and Retail.

- Promotion of Draft 1 and Draft 2 material, as well as consultation activities via SkillsIQ's networks and stakeholders (representing more than 15,000 contacts across approximately 50 industries)

- Liaising with the other Skills Service Organisation (SSO) so they could distribute the project drafts and consultation activities to their IRCs and stakeholders.

In addition to the industries represented by PRG members, stakeholders from the following industries also viewed and commented on the suite of Training Package Products:

o Agriculture	o Local Government
o Complementary Health	o Logistics
o Creative, Leisure and Technology	o Skills Advisory Bodies
o Financial services	o Skills Service Organisation
o Government	o Translation and Interpretation
o Human Resources - Recruitment	

Discussions with individuals during the webinars and workshops indicated that the majority of stakeholders that actively participated in the consultations represented individuals who have some role and/or responsibility in planning and/or skills training for online and social media use. The consultations therefore reflected a relatively experienced and knowledgeable audience group able to comment on both skills content for an industry, and the practicalities of implementation of training.

The diversity of participation has ensured that the final products put forward are fit-for-purpose and can be applied in context to different industries and job roles.

State and Territory engagement

Throughout each key stage, states and territories have been involved through the engagement of employers, ITABs, State Training Authorities (STAs) and various state and territory networks and representative bodies. Access to the draft Training Package Products and supporting documentation was provided to these stakeholders via different channels including direct email correspondence, SkillsIQ's Online Feedback Forum and webinars and workshops.

Implementation was a key issue raised by STAs and those stakeholders involved in course design. Advice on the management of implementation is provided within the supporting Companion Volume Implementation Guide (CVIG).

STAs will be provided with access to Final Draft Training Package Products, the Case for Endorsement and the Companion Volume Implementation Guide for final comment prior to submission for endorsement.

Table 4: Summary of State Training Authority Responses

State	Response
ACT	*To be completed prior to submission*
QLD	*To be completed prior to submission*
NSW	*To be completed prior to submission*
NT	*To be completed prior to submission*
SA	*To be completed prior to submission*
TAS	*To be completed prior to submission*
VIC	*To be completed prior to submission*
WA	*To be completed prior to submission*

Advice on alternative approaches explored and competing views (if any)

- The main debateable point raised during the project was in relation to the original Unit of Competency proposed for the suite of cross-sector Training Package Products - *Use information and computer technology*. Stakeholders indicated that existing Units of Competency covered the skills and knowledge areas of the new Unit proposed, and as content was all related to technology, it was better suited to be linked with the ICT Training Package rather than the cross-sector suite.

  The intent of the original Unit was to provide a holistic Unit to cover computer skills and Internet skills required by individuals with minimal digital literacy. It aimed to collate in one Unit key skills which are currently scattered across various Units.

  Response actioned: Acknowledging the feedback provided, and in line with the Council of Australian Governments' (COAG's) priorities for minimising duplication in Training Packages, a decision was made to discontinue with the Unit. During the Draft 2 validation period, stakeholders were informed of this to which all were supportive.

- There was some comment that the following sentences in Draft 1 should be removed from the **Application statements** as they were considered too broad and the purpose was not clear:

  - *References to customers should be interpreted in the context of the particular industry and organisation which will use different terms to describe their stakeholders.*
  - *Training and assessment should be contextualised to meet the particular requirements of the industry for which it is delivered.*

  Others suggested retaining the statement but strengthening to avoid Registered Training Organisation (RTO) and auditor misinterpretation, and this should include information about maintaining integrity of unit content.

  Response actioned: *Phase 1* consultation emphasised the importance of ensuring contextualised assessment to avoid generic outcomes therefore the statements have been retained, however they have been rehoused in Assessment Conditions for a better fit. It becomes a condition of assessment that context is provided for *assessment* (remembering that Units cannot include requirements for *training*). Statements have also been rewritten for further clarity.

- The original Draft 1 **Assessor Requirements** indicated that assessors must 'have at least three *years' experience*' in applying the skills and knowledge covered by the Unit for the industry of focus. Feedback indicated that this specification was not necessary, and the quality of an assessor can be managed by adherence to the Standards for Registered Training Organisations (RTOs).

  Response actioned: Discussions with stakeholders and PRG members confirmed agreement on this and the statement now reads: Assessors must satisfy the assessor requirements nominated in the Standards for *Registered Training Organisations, or*

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their successor, and must have workplace experience where they have applied the skills and knowledge covered in this unit of competency.

Expected impact of new Training Package Products

The four Skill Sets and seven Units of Competency proposed within this Case for Endorsement are new Training Package Products. There are no Training Package Products proposed for deletion in this Case for Endorsement. Instead, recommendations have been put forward on how the new products may be applied across different Training Packages and potentially replace existing Units where minimal impact of change has been identified.

See **Appendix F** for further details regarding the mapping exercise conducted to determine where the cross-sector Units may be used to potentially replace existing Units in Training Packages. Table 5 outlines those existing Training Package Products where strong associations have been determined with the cross-sector Units.

Table 5: Summary of associations assessed between cross-sector Units and existing Training Package Products

Training Package Code	Training Package Name	Training Product Code	Training Product Name	Existing Training Package Product reviewed		
				Training Package Code	Training Product Code	Training Product Name
SIR	Retail Services	SIRXOSM003	Use social media and online tools	SIT	SITXEBS001	Use social media in a business
				SIR	SIRXMKT002	Use social media to engage customers
SIR	Retail Services	SIRXOSM005	Develop a basic website for customer engagement	SIT	SITXEBS003	Build and launch a small business website
SIR	Retail Services	SIRXOSM006	Develop and manage social media and online strategies	BSB	BSBMKG537	Plan social media engagement
				SIR	SIRXMKT006	Develop a social media strategy
				SIT	SITXEBS002	Develop, implement and monitor the use of social media in a business

Please note that the associations outlined above, and recommendations in **Appendix F** are put forward for the consideration of the respective IRCs that oversee the Training Packages identified as housing Units of Competency impacted by the new cross-sector online and social media Units.

As the Training Package Products are all new, there are no RTOs which have the Skill Sets or Units on their scope of registration.

Industry's expectation of training delivery

The rate of digital advancement in all sectors is rapidly evolving and so industry's expectation is that common online and social media engagement skills Units will:

- **Facilitate access to a multi-skilled workforce** equipped to support wider business operations regarding online and social media engagement activities

- **Ensure the future supply of the workforce** (across multiple industries) is up-to-date with latest online and social media trends and techniques to support business innovation
- **Enhance an employers' ability** to raise brand visibility and awareness across online and social media channels to support business growth
- **Improve business planning** and decision-making processes through access to performance data via online and social media analytics
- **Enhance a graduate's employability** as students have access to training in skills areas which complement industry-specific training qualifications.

This training also has the capacity to **expand employment pathways** for individuals (as well as management and business owners) as they are equipped to participate in broader role activities and take forward wider business operations. i.e. an **Apprentice Chef** can support its employer (a restaurant) improve and increase its social media presence via Instagram postings, a **Retail Manager** in a small business can plan and implement a social media strategy and expand its online customer base, a **Volunteer Co-ordinator** can use a social media platform to promote events and expand its network and community, an **Electrician** and business owner) can set up a basic website and establish and online presence in order to grow its business.

Industry values training and assessment that provide exposure to real and current work environments, scenarios and workplace contexts, although it is not always appropriate to assess in the workplace. The Units of Competency therefore provide flexibility in assessment, especially in relation to activities involving communication with customers and a team, and specify in the Assessment Requirements:

Assessment must ensure use of real workplace situations, or simulated activities, or case study scenarios that test aspects of this unit that involve customer and team communication.

It is noted that Training Packages cannot mandate either the duration of training or delivery modes. A Companion Volume Implementation Guide is available to further support training delivery and implementation of the cross-sector Units.

Traineeship or apprenticeship potential

There are no qualifications proposed within this Case for Endorsement.

D. Implementation of the new Training Package

Occupational and licensing requirements.

At the time of publication, there are no requirements for:

- any worker to hold an occupational licence to utilise online and social media platforms as business tools, or
- any worker to be certified in any Units of Competency to satisfy regulatory requirements.

Implementation issues of note and management strategy.

Implementation of new Units of Competency and Qualifications creates flow-on impacts and costs for RTOs in relation to administrative systems, training resources and assessment materials. In the short term, it is anticipated that there will be an administrative burden on RTOs as they look to update their scope of delivery to include the new Training Package Products. Trainers and assessors will need to be apprised of the content of the new Training Package Products and the methods used to deliver and assess them, and resources will need to be developed to support this delivery and assessment.

The following measures will need to be put in place to address systemic issues and ensure effective implementation:

- strong and ongoing relationships between industry/businesses and training providers, and industry involvement in the validation of learning and assessment materials/activities
- robust and reliable assessment by RTOs, including in relation to prior recognition practices
- the creation of new training and assessment resources to reflect the new Units of Competency.

Training Package Products proposed within this Case for Endorsement do not have associated work placement requirements.

Due to the unique cross-sectoral nature of the Training Package Products, implementation processes and guidelines are currently being set by the Department of Education and Training, and the AISC. Key principles for the protocols and overall management of cross-sector products that are to be defined include leadership arrangements, accountability and transparency. The final protocols will be aligned with, and complementary to, the Training Package Development and Endorsement Process Policy.

During development, a range of stakeholders raised questions about where cross-sector online and social media units would be housed. Some were concerned that the units would not be found within a qualification, making it difficult for users to:

- understand the complexity of skills and knowledge described by units
- understand how units relate to different job roles, their complexity and seniority
- comply with packaging rules in certain Training Package qualifications that prescribe a requirement for the use of imported elective units "first packaged in an AQF Certificate II, III etc.".

As a primary step in the implementation process, the units have been housed in the existing SIR Retail Services qualifications as electives to:

- provide implementation examples of how units might best be packaged to align to different job roles and AQF specifications
- reduce barriers for implementation as chosen electives, encouraging immediate implementation across industries
- allow for a broad range of disparate packaging rules within existing and future Training Package qualifications.

Table 6: Cross-sector Online and Social Media Units of Competency packaged as Electives across the SIR Retail Services Training Package Products

Cross-sector Online and Social Media Units packaged as Elective		SIR Retail Services Qualification			
		Certificate II in Retail Services	Certificate III in Retail	Certificate IV in Retail Management	Diploma of Retail Leadership
SIRXOSM001	Identify and review social media and online platforms for organisational use	√	√		
SIRXOSM002	Maintain ethical and professional standards when using social media and online platforms		√	√	√
SIRXOSM003	Use social media and online tools		√	√	
SIRXOSM004	Analyse performance of social media and online business tools			√	
SIRXOSM005	Develop a basic website for customer engagement			√	
SIRXOSM006	Develop and manage social media and online strategies				√
SIRXOSM007	Manage risk to organisational reputation in an online setting.				√

Note: Shaded cells denote the AQF level where it would be appropriate to first use a unit.

[Allocation and management of funding associated with the delivery of new Training Package Products will be determined by the appropriate state and territory bodies in consultation with industry stakeholders in their respective jurisdictions – TBC by the Department and the AISC]

E. Quality Assurance reports

This Case for Endorsement supports the Training Package Products, listed in **Appendix A: List of Training Package Products proposed for endorsement**, proposed for inclusion in the SIR Retail Services Training Package. SkillsIQ declares that these Training Package Products have been developed in accordance with the requirements of the *Standards for Training Packages 2012, Training Package Products Policy* and *Training Package Development and Endorsement Process Policy*.

An independent review of the SIR Training Package Products submitted for endorsement was undertaken by Tina Berghella. The Quality Report (**Appendix E: Quality Assurance Reports**) confirms that the proposed Products meet the requirements of the Standards for Training Packages 2012, inclusive of the Training Package Quality Principles. Prior to the completion of the Quality Report, all qualifications, Units of Competency and Assessment Requirements were reviewed against the Standards for Training Packages. The Editorial Report and the Equity Report were completed by Bernadette Delaney, a member of the Quality Assurance Panel. (**Appendix E: Quality Assurance Reports**).

The SIR Retail Services Companion Volume Implementation Guide will be available on VETNet with links provided on www.training.gov.au.

F. Implementation of the COAG Industry and Skills Council reforms to Training Packages

The development of Training Package Products proposed within this Case for Endorsement considered opportunities to support the COAG Industry and Skills Council and used consultation activities and stakeholder engagement to achieve the following priorities:

- **document** industry expectations for training delivery and assessment related to online and social media engagement through the SIR Retail Services Companion Volume Implementation Guide
- **enhance** the portability of skills from one related occupation to another as the online and social media skills are cross-sectoral in nature and provide transferable skills for workers to apply in different role types and industries
- **remove unnecessary duplication** within the system and create Training Package Products that have **application to multiple industry** sectors as all products have been specifically developed for cross-sectoral application
- **develop four new Skill Sets** which can be applied across a range of industries and job roles.

Due to the specific nature of work undertaken, and the Units of Competency proposed, there are no obsolete Training Package Products, and neither was there a need to delete or remove any Training Package Products. Instead, a mapping exercise has been conducted to showcase examples of where these cross-sector Units may potentially replace existing Units in Training Packages and opportunities to import into qualifications (see **Appendix F**).

SkillsIQ confirms that development work has addressed work assigned by the AISC in the Activity Order that was issued.

G. A copy of the full content of the proposed Training Package Product(s)

Training Package Products proposed for endorsement can be found at **Appendix G: Copy of Training Package Products proposed for endorsement.** The Training Package Products will be loaded on the National Register through the Training Package Content Management System (TPCMS).

Appendix A: List of Training Package Products proposed for endorsement

Skill Sets

Skill Set Title
SIRSS00018 Understand the use of social media for business purposes
SIRSS00019 Implement social media and online customer engagement
SIRSS00020 Manage and implement social media and online customer engagement
SIRSS00021 Develop an online presence for customer engagement.

Units of Competency and Assessment Requirements

Unit Code	Unit Title
SIRXOSM001	Identify and review social media and online platforms for organisational use
SIRXOSM002	Maintain ethical and professional standards when using social media and online platforms
SIRXOSM003	Use social media and online tools
SIRXOSM004	Analyse performance of social media and online business tools
SIRXOSM005	Develop a basic website for customer engagement
SIRXOSM006	Develop and manage social media and online strategies
SIRXOSM007	Manage risk to organisational reputation in an online setting.

Appendix B: Letters of support

The following stakeholders have provided letters of support or have indicated that they will supply letters of support in regard to this submission on behalf of their IRC.

Name of Stakeholder	Organisation [and IRC]
Sha Cordingley	Australian Community Workers Association *[Community Sector & Development IRC]*
Bethwyn Serow	Australian Major Performing Arts Group (AMPAG) *[Cultural and Related Industries IRC]*
Jim Wyatt	Optimi Digital *[ICT IRC]*
Kristian Stratton	Australian Industry Group (Ai Group) [Manufacturing and Engineering IRC]
Jeffrey Lehrer	Scouts Australia *[Sport and Recreation IRC]*
Norma Roberts	Retail and Personal Services Skills Advisory Council *[Wholesale and Retail IRC] [Personal Services IRC]*
Michael Magelakis	SSMI Group *[Business Services IRC – currently in the process of obtaining the letter]*
Andrew Shea	Australian Council for Private Education and Training *[Education IRC - currently in the process of obtaining the letter]*
Stephen Lunn	Australian Culinary Federation (ACF) *[Tourism, Travel and Hospitality IRC - currently in the process of obtaining the letter]*

Community Sector and Development IRC

Silvia Munoz

Head of Research

SkillsIQ Ltd.

GPO Box 4194

SYDNEY NSW 2001

Re: Endorsement of the Cross-sector Online & Social Media Training Package Products (SIR Retail Services Training Package V4.0)

Dear Silvia,

As Chair of the Community Sector and Development Industry Reference Committee (IRC) I am satisfied that our sector has been given ample opportunity to express our needs, and that those needs have been appropriately responded to in the final versions of the cross-sector Online & Social Media Training Package Products presented to me.

Digitalisation and the continuing increase in consumer demand for online & social media interactions mean that online & social media engagement is (and will continue to be) an essential area for businesses across all industries.

The CS&D IRC, via my involvement on the cross-sector reference group, supports the Consumer Engagement via Online & Social Media Case for Endorsement and the proposed cross-sector Training Package Products believing they will provide individuals with access to units and skill sets which complement training in their industry-specific qualifications as well as maximizing the transferability of skills across occupations and industries.

Collectively, IRC members believe these new cross-sector Training Package Products will support the Vocational Education and Training (VET) sector in achieving strong outcomes in skilling the workforces of multiple industries, including the various industries and sectors our IRC represents, so that they are confidently able to conduct consumer engagement via online & social media in the workplace.

Kind regards

Sha Cordingley| Australian Community Workers Association

Chair CS&D IRC

22 May 2019

22nd May 2019

Silvia Munoz
Head of Research
SkillsIQ Ltd.
GPO Box 4194
SYDNEY NSW 2001

Re: Endorsement of the Cross-sector Online & Social Media Training Package Products (SIR Retail Services Training Package V4.0)

Dear Silvia,

As a member of the Culture and related Industries Industry Reference Committee (IRC) ,representing the Australian Major Performing Arts Group, I am satisfied that our industry has been given the opportunity to express our needs, and that those needs have been appropriately responded to in the final versions of the cross-sector Online & Social Media Training Package Products presented to me.

Digitalisation and the continuing increase in consumer demand for online & social media interactions mean that online & social media engagement is (and will continue to be) an essential area for businesses, in which *all* industries will be involved.

I have distributed the Training Package to the Culture and related Industries IRC and can the committee's support for the cross-sector Consumer Engagement via Online & Social Media Case for Endorsement and the proposed cross-sector Training Package Products. We believe they will provide individuals with access to Units and skill sets which complement training in their industry-specific qualifications, and also maximise the transferability of skills across occupations and industries.

Collectively, IRC members believe these new cross-sector Training Package Products will support the Vocational Education and Training (VET) sector in achieving strong outcomes in skilling the workforces of multiple industries, including the various industries and sectors our IRC represents, so that they are confidently able to conduct consumer engagement via online & social media in the workplace.

Regards,

Bethwyn Serow
Executive Director
Australian Major Performing Arts Group
Member of the Culture and related Industries IRC

Wednesday, 29 May 2019

Silvia Munoz
Head of Research
SkillsIQ Ltd.
GPO Box 4194
SYDNEY NSW 2001

Re: Endorsement of the Cross-sector Online & Social Media Training Package Products (SIR Retail Services Training Package V4.0)

Dear Silvia,

I am writing in my capacity as Chair of the Manufacturing and Engineering Industry Reference Committee (IRC), to provide in-principle support for the cross-sector Consumer Engagement via Online & Social Media Case for Endorsement and the proposed cross-sector Training Package Products.

The Manufacturing and Engineering IRC has been given the opportunity to review and provide input into the final versions of the cross-sector Online & Social Media Training Package Products.

Given that digitalisation and online and social media interactions will continue to be an essential area for businesses, including manufacturing sectors; the Manufacturing and Engineering IRC will consider opportunities to integrate cross-sector Online and Social Media Training Package Products into future MEM Manufacturing and Engineering Training Package development work where applicable.

Collectively, IRC members believe these new cross-sector Training Package Products will support the Vocational Education and Training (VET) sector in achieving strong outcomes in skilling the workforces across multiple industries, including the various industries and sectors our IRC represents, so that they are confidently able to conduct consumer engagement via online & social media in the workplace.

Regards,

Ian Curry
National Coordinator – Skills, Training & Apprenticeships
Australian Manufacturing Workers, Union
Chair
Manufacturing and Engineering Industry Reference Committee

23 May 2019

Silvia Munoz
Head of Research
SkillsIQ Ltd.
GPO Box 4194
SYDNEY NSW 2001

Re: Endorsement of the Cross-sector Online & Social Media Training Package Products (SIR Retail Services Training Package V4.0)

Dear Silvia,

As chair of the ICT Industry Reference Committee (IRC) representing Optimi Digital, I am satisfied that our industry has been given the opportunity to express our needs, and that those needs have been appropriately responded to in the final versions of the cross-sector Online & Social Media Training Package Products presented to me.

Digitalisation and the continuing increase in consumer demand for online & social media interactions mean that online & social media engagement is (and will continue to be) an essential area for businesses, in which **all** industries will be involved.

The ICT IRC supports the cross-sector Consumer Engagement via Online & Social Media Case for Endorsement and the proposed cross-sector Training Package Products. We believe they will provide individuals with access to Units and skill sets which complement training in their industry-specific qualifications, and also maximise the transferability of skills across occupations and industries.

Collectively, IRC members believe these new cross-sector Training Package Products will support the Vocational Education and Training (VET) sector in achieving strong outcomes in skilling the workforces of multiple industries, including the various industries and sectors our IRC represents, so that they are confidently able to conduct consumer engagement via online & social media in the workplace.

Regards,

James (Jim) Wyatt
ICT IRC Chair
Optimi Digital
Information and Communications Technology IRC

15 May 2019

Silvia Munoz
Head of Research
SkillsIQ Ltd.
GPO Box 4194
SYDNEY NSW 2001

**Re: Endorsement of the Cross-sector Online & Social Media Training Package Products
(SIR Retail Services Training Package V4.0)**

Dear Silvia,

As a member of the Personal Services Industry Reference Committee (IRC) representing Retail and Personal Services Skills Advisory Council I am satisfied that our industry has been given the opportunity to express our needs, and that those needs have been appropriately responded to in the final versions of the cross-sector Online & Social Media Training Package Products presented to me.

Digitalisation and the continuing increase in consumer demand for online & social media interactions mean that online & social media engagement is (and will continue to be) an essential area for businesses, in which *all* industries will be involved.

The Personal Services IRC supports the cross-sector Consumer Engagement via Online & Social Media Case for Endorsement and the proposed cross-sector Training Package Products. We believe they will provide individuals with access to Units and skill sets which complement training in their industry-specific qualifications, and also maximise the transferability of skills across occupations and industries.

Collectively, IRC members believe these new cross-sector Training Package Products will support the Vocational Education and Training (VET) sector in achieving strong outcomes in skilling the workforces of multiple industries, including the various industries and sectors our IRC represents, so that they are confidently able to conduct consumer engagement via online & social media in the workplace.

Regards

Norma Roberts

Executive Director
Retail and Personal Services Skills Advisory Council
Personal Services IRC

Sport, Fitness and Recreation

Industry Reference Committee

25 May 2019

Silvia Munoz

Head of Research

SkillsIQ Ltd.

GPO Box 4194

SYDNEY NSW 2001

**Re: Endorsement of the Cross-sector Online & Social Media Training Package Products
(SIR Retail Services Training Package V4.0)**

Dear Silvia,

In my capacity of Chair of the Sport, Fitness and Recreation Industry Reference Committee (IRC), I am satisfied that our industry has been given the opportunity to express our needs, and that those needs have been appropriately responded to in the final versions of the cross-sector Online & Social Media Training Package Products.

Digitalisation and the continuing increase in consumer demand for online & social media interactions mean that online & social media engagement is (and will continue to be) an essential area for businesses, in which *all* industries will be involved.

The Sport, Fitness and Recreation IRC supports the cross-sector Consumer Engagement via Online & Social Media Case for Endorsement and the proposed cross-sector Training Package Products. We believe they will provide individuals with access to Units of Competency and Skill Sets which complement training in their industry-specific qualifications, and also maximise the transferability of skills across occupations and industries.

Collectively, IRC members believe these new cross-sector Training Package Products will support the Vocational Education and Training (VET) sector in achieving strong outcomes in skilling the workforces of multiple industries, including the various industries and sectors our IRC represents, so that they are confidently able to conduct consumer engagement via online & social media in the workplace.

Regards,

Jeffrey Lehrer

Chair, Sport, Fitness and Recreation IRC

14th May 2019

Silvia Munoz
Head of Research
SkillsIQ Ltd.
GPO Box 4194
SYDNEY NSW 2001

Re: Endorsement of the Cross-sector Online & Social Media Training Package Products
(SIR Retail Services Training Package V4.0)

Dear Silvia,

As a member of the Wholesale and Retail Industry Reference Committee (IRC) representing the Retail and Personal Services Skills Advisory Council I am satisfied that our industry has been given the opportunity to express our needs, and that those needs have been appropriately responded to in the final versions of the cross-sector Online & Social Media Training Package Products presented to me.

Digitalisation and the continuing increase in consumer demand for online & social media interactions mean that online & social media engagement is (and will continue to be) an essential area for businesses, in which *all* industries will be involved.

The Wholesale and Retail IRC supports the cross-sector Consumer Engagement via Online & Social Media Case for Endorsement and the proposed cross-sector Training Package Products. We believe they will provide individuals with access to Units and skill sets which complement training in their industry-specific qualifications, and also maximise the transferability of skills across occupations and industries.

Collectively, IRC members believe these new cross-sector Training Package Products will support the Vocational Education and Training (VET) sector in achieving strong outcomes in skilling the workforces of multiple industries, including the various industries and sectors our IRC represents, so that they are confidently able to conduct consumer engagement via online & social media in the workplace.

Yours sincerely

Norma Roberts
Executive Director
Retail and Personal Services Skills Advisory Council
Wholesale and Retail IRC

Appendix C: Wholesale and Retail IRC and Online and Social Media PRG membership

Wholesale and Retail IRC

Name	Organisation
Jeff Rogut (Chair)	Australasian Association of Convenience Stores Ltd
Garry Terrill	Australian Retailers Association
JY Bae	Kentucky Fried Chicken Pty Ltd
Linda Hosking	Lagardere Travel Retail
Charles Nord	Leading Edge Group
Yvonne Williams	National Retail Association
Lenore Dembski	Paperbark Woman
Norma Roberts (Deputy Chair)	Retail and Personal Services Skills Advisory Council
Matthew Galbraith	Shop Distributive and Allied Employees' Association
Sue Bond	The Pharmacy Guild of Australia

Online and Social Media PRG

Name	Organisation
Sha Cordingley	Australian Community Workers Association
Andrew Shea	Australian Council for Private Education and Training
Stephen Lunn	Australian Culinary Federation (ACF)
Kristian Stratton	Australian Industry Group (Ai Group)
Bethwyn Serow	Australian Major Performing Arts Group (AMPAG)
Jim Wyatt	Optimi Digital
Norma Roberts	Retail and Personal Services Skills Advisory Council
Jeffrey Lehrer	Scouts Australia
Michael Magelakis	SSMI Group

Appendix D: Stakeholder consultation and engagement list

Name	Organisation
Paolo Damante	Ai Group
Vicki Shearer	Amazing Education and Training
Jeff Rogut	Australasian Association of Convenience Stores
Tristan Richards	Australian Computer Society
Dianne Fullelove	Australian Melon Association Inc
Sharon Luhr	Australian Pacific College/English Unlimited
Shivali M.	Australian Training Products
Tim Nelson	Australian Training Products
Sarah Fitzgibbon	AVTES
Coby Liddell	Binnacle Training
Barbara Lane	Business Growth Centre
Rhona Strickland	Central Queensland University
Sam Willoughby	Central Queensland University
Penny Boston	Central Regional TAFE
Mandy Kirkland	Charles Darwin University
Alan Daniel	Chisholm Institute
Dante St James	Clickstarter
Ron Browne	ClubsNSW
Michael McGee	Department of State Growth – Skills Tasmania
Paul Muenchow	Department of Training and Workforce Development
Salina Hand	Department of Training and Workforce Development
Alison Sweet	Financial, Administrative and Professional Services Training Council Inc
Ann-Marie Ryan	FutureNow
Roma Jaitly	Greenwich Management College
Debbie Knight	Industry Skills Advisory Council Northern Territory (ISACNT)
Alana Treagus	Industry Skills Advisory Council Northern Territory (ISACNT)
Kay Price	Industry Skills Advisory Council Northern Territory (ISACNT)
David Galbraith	Innovation & Business Skills Australia Manufacturing
Heather Glass	Japan Australia Word Services Pty Ltd
Meikin Rees	Laser Therapy & Natural Medicine Pty Ltd
Amanda Green	Logistics Training Council
Michael Taremba	Logistics Training Council

Name	Organisation
Vivienne O'Shannessy	Melbourne City Institute of Education
Irene Mooney	My Vista
Sireesha Gollakota	NSW Ministry of Health
Tessa Hermens	NSW Ministry of Health
Tamara Lee	NSW Ministry of Health
Lenore Dembski	Paperbark Woman
Jo Chiu	Queensland Fitness Sport & Recreation Skills Alliance
Norma Roberts	Retail and Personal Services (RAPS) Skills Advisory Council
Rosa Slaiman	Roads & Maritime Services
Raelene King	Sarina Russo Institute
Jeffrey Lehrer	Scouts Australia
Sandra Motallebi	Scouts Australia
Tina Phillips	Shire of Toodyay
Sandra Robinson	Skills Strategies International
Rose Felice	Socialbuzz Digital Marketing
Daniele Richter	Social Media College
Jonathan Tanner	Social Media College
April Owen	South Metro TAFE
Liz Pilkington	Sterling Business College
Christine Foard	Swinburne University
Jennifer Fleischer	Swinburne University of Technology, PAVE
Janet Hanlan	TAFE NSW
Kate McCluskey	TAFE NSW
Suzanne Robertson	TAFE NSW
Denise Morgan	TAFE Queensland East Coast
Andrew McKenzie	TAFE Queensland Southbank
Andrea Poletti	TAFENSW
Barbara Clifford	The Time Tamer
Melanie Alexandria	Velg Training
Michelle Weaver	Velg Training
Alison Hollands	Victoria University
Danielle McAuliffe	Victorian Curriculum and Assessment Authority
Julie Esson	Vocational Training Materials Australia
Michael McGee	Workforce Development & Training Branch (Skills Tasmania)

Appendix E: Quality Assurance Reports

Editorial Report

1. Cover page	
Information required	**Detail**
Training Package title and code	SIR Retail Services Training Package Release 4.0
Number of new qualifications and their titles	Nil
Number of revised qualifications and their titles	Nil
Number of new units of competency and their titles	7 new units of competency: • SIRXOSM001 Identify and review social media and online platforms for organisational use • SIRXOSM002 Maintain ethical and professional standards when using social media and online platforms • SIRXOSM003 Use social media and online tools • SIRXOSM004 Analyse performance of social media and online business tools • SIRXOSM005 Develop a basic website for customer engagement • SIRXOSM006 Develop and manage social media and online strategies • SIRXOSM007 Manage risk to organisational reputation in an online setting 4 new skill sets: • SIRSS00018 Understand the use of social media for business purposes • SIRSS00019 Implement social media and online customer engagement • SIRSS00020 Manage and implement social media and online customer engagement • SIRSS00021 Develop an online presence for customer engagement
Number of revised units of competency and their titles	Nil
Confirmation that the draft training package components are publication-ready	Yes, the draft training package components are publication-ready.
Is the Editorial Report prepared by a member of the Quality Assurance Panel? If 'yes' please provide a name.	Yes Bernadette Delaney
Date of completion of the report	31st May, 2019

2. Content and structure

Units of competency

Editorial requirements	Comments
Standard 5: • The structure of units of competency complies with the unit of competency template.	Yes, the structure of the units of competency is compliant with the template covering code, title, application, prerequisite unit, competency field, unit sector, elements, performance criteria, foundation skills, unit mapping and a link to the *SIR Retail Services Training Package Release 4.0 Companion Volume Implementation Guide.* The units provide good consistent detail and reflect the title and the Application. Foundation Skills are documented. The structure of each unit was checked and cross referenced for consistency.
Standard 7: • The structure of assessment requirements complies with the assessment requirements template.	Yes, the structure of the Assessment Requirements is compliant covering performance and knowledge evidence, assessment conditions and a link to the *Companion Volume Implementation Guide.* The Assessment requirements address required evidence, volume and frequency, necessary knowledge and details to guide assessment conditions.

Qualifications

Editorial requirements	Comments by the editor
Standard 9: • The structure of the information for qualifications complies with the qualification template.	Not applicable
Standard 10: • Credit arrangements existing between Training Package qualifications and Higher Education qualifications are listed in a format that complies with the credit arrangements template.	Not applicable

Companion Volumes

Editorial requirements	Comments by the editor
Standard 11: • A quality assured companion volume implementation guide is available and complies with the companion volume implementation guide template.	Yes, the draft *The SIR Retail Services Training Package Release 4.0 Companion Volume Implementation Guide* is compliant and covers all mandatory fields of the template as well as additional material to guide implementation and explain the unique characteristics of cross sector units.

3.   Proofreading

Editorial requirements	Comments by the editor
• **Unit codes and titles** and **qualification codes and titles** are accurately cross-referenced throughout the training package product(s) including mapping information and packaging rules, and in the companion volume implementation guide.	Yes, the unit codes and titles are consistent across publications.
• Units of competency and their **content** are **presented in full**.	Yes, all units of competency were presented in full.

• The author of the Editorial Report is satisfied with the quality of the training products, specifically with regard to:
  o absence of spelling, grammatical and typing mistakes
  o consistency of language and formatting
  o logical structure and presentation of the document.
  o compliance with the required templates
	Yes, all training products have been checked. The developers have addressed all issues:
	• the units and assessment requirements comply with the required templates
	• issues to improve clarity have been addressed
	• the units submitted for endorsement have been edited for consistency within units and for consistency across units
	• cross referencing between training products has been checked for consistency of formats and language
	• internal consistency between units of competency sections and assessment requirements have been checked
	• all units and skill sets are logically and clearly presented.

Equity Report

Section 1 – Cover page

Information required	Detail
Training Package title and code	SIR Retail Services Training Package Release 4.0
Number of new qualifications and their titles [1]	Nil
Number of revised qualifications and their titles	Nil
Number of new units of competency and their titles	7 new units of competency: • SIRXOSM001 Identify and review social media and online platforms for organisational use • SIRXOSM002 Maintain ethical and professional standards when using social media and online platforms • SIRXOSM003 Use social media and online tools • SIRXOSM004 Analyse performance of social media and online business tools • SIRXOSM005 Develop a basic website for customer engagement • SIRXOSM006 Develop and manage social media and online strategies • SIRXOSM007 Manage risk to organisational reputation in an online setting 4 new skill sets: • SIRSS00018 Understand the use of social media for business purposes • SIRSS00019 Implement social media and online customer engagement • SIRSS00020 Manage and implement social media and online customer engagement • SIRSS00021 Develop an online presence for customer engagement.
Number of revised units of competency and their titles	Nil
Confirmation that the draft training package components meet the requirements in Section 2 *Equity checklist of draft training package components*	Yes, the draft training package products meet these requirements.
Is the Equity Report prepared by a member of the Quality Assurance Panel? If 'yes' please provide the name.	Yes Bernadette Delaney
Date of completion of the report	31st May, 2019

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[1] *When the number of training products is high the titles can be presented as an attached list.*

Section 2 – Equity checklist of draft training package components

Equity requirements	Equity reviewer comments Provide brief commentary on whether the draft endorsed components meet each of the equity requirements
The training package component(s) comply with Standard 2 of the *Standards for Training Packages 2012*. The standard requires compliance with the *Training Package Products Policy*, specifically with the access and equity requirements: • Training Package developers must meet their obligations under Commonwealth anti-discrimination legislation and associated standards and regulations. • Training Package developers must ensure that Training Packages are flexible and that they provide guidance and recommendations to enable reasonable adjustments in implementation.	Yes, there is compliance with Standard 2 of the *Standards for Training Packages 2012* and *Training Package Products Policy.* **Access and Equity Requirements** These cross sector training products are specifically designed to be flexible and present no barriers to access. The *SIR Retail Services Training Package Release 4.0 Companion Volume Implementation Guide* has a section on access and equity (2.9 and 2.9.1), reasonable adjustment (section 2.9.2) and adjusting practice but not the standard (section 2.9.3). These sections provide very clear advice and illustrated with examples from these cross sector training products, relevant implementation issues . **Foundation skills** The *SIR Retail Services Training Package Release 4.0 Companion Volume Implementation Guide* has a section on Foundation Skills (section 2.6) that explains the design and approach. In each unit of competency presented Foundation Skills are clearly set out and will provide good guidance for implementation. **Units of Competency** The units presented have the required code and titles. All units are new so no mapping is provided in the *SIR Retail Services Training Package Release 4.0 – Online and Social Media Companion Volume implementation guide.* **Skill Sets** The Skill Sets presented include details about: • an overview description of the set of skills and their purpose and units of competency to be attained to meet an industry need • pathways information and advice about credit in relation to qualifications • suggested words for a statement of attainment.

Section 3 - Training Package Quality Principles

Quality Principle 4

Be **flexible** to meet the diversity of individual and employer needs, including the capacity to adapt to changing job roles and workplaces.

Key features

Do the units of competency meet the diversity of individual and employer needs and support equitable access and progression of learners?
What evidence demonstrates that the units of competency and their associated assessment requirements are clearly written and have consistent breadth and depth so that they support implementation across a range of settings?

Are there other examples that demonstrate how the key features of flexibility are being achieved?

Equity requirements	Equity reviewer comments
1. What evidence demonstrates that the draft components provide flexible qualifications/units of competency that enable application in different contexts?'	The *Case for Endorsement* explains that "*Units and Skill Sets specifically target the skills and knowledge required to work with social media and other online platforms used to engage consumers. They do not target any particular industry and have been written broadly enough to apply to any context.*" These training products apply to all workplaces using online and social media-the self-employed and small businesses, as well as private and government medium and large organisations, that use social media and online tools for marketing and customer engagement. Units are able to be in qualifications as diverse as those for retail service, health, manufacturing, construction, public sector, infrastructure, mining, forestry, creative and business industries. In these qualifications they would be incorporated as electives. Table 8 p.13 in the *SIR Retail Services Training Package Release 4.0 Companion Volume Implementation Guide* illustrates how units are applicable in two to three certificates in retail services. It is the nature of these cross sector units that they are written broadly so that they will be applicable to different industries and organisations as well a range of work places. In order to achieve this design and content in the unit, the development team undertook research and consultation across a wide range of industries. Five of the draft units of competency developed have no prerequisites so can be accessed by a range of learners as electives in qualifications. The units of competency are detailed, clearly written and consistent in their presentation. They provide good direction for the skill and knowledge requirements to suit cross sector purposes. The assessment requirements clearly and comprehensively describe the performance and knowledge evidence required as well as the assessment conditions. The Skill Sets provide flexibility to enable application in different contexts. These Skill Sets are "*structured to progress in complexity from understanding the business use of online and social media platforms, to implementing their use according to predetermined plans, to managing customer engagement by developing plans and policies*" (CVIG, p14). They focus on skills needed for all types of businesses.
2. Is there evidence of multiple entry and exit points?	Not applicable.
3. Have prerequisite units of competency been minimised where possible?	Across the cross-sector online and social media units there are very few prerequisites (CVIG, 2.4.2). Those with prerequisites have been carefully structured so that the prerequisite knowledge and skills is essential. Two units (SIRXOSM003 Use social media and online tools; SIRXOSM006 Develop and manage social media

Equity requirements	Equity reviewer comments
	and online strategies) have a prerequisite (SIRXOSM002 Maintain ethical and professional standards when using social media and online platforms) which is logical in terms of the content and skill demands of both units. Having a foundation in ethics and professional standards is important for the use of social media in SIRXOSM003 and the management responsibilities reflected in SIRXOSM006.
4. Are there other examples of evidence that demonstrate how the key features of the flexibility principle are being achieved?	The seven draft units of competency developed will apply across a broad range of industries. The *SIR Retail Services Training Package Release 4.0 Companion Volume Implementation Guide* describes how the content of the online and social media training products is based on what suited a wide range of industries. The development process identified that generic knowledge and skills training for online and social media engagement is needed by, and is beneficial to, all industries.

Quality Principle 5

Facilitate **recognition** of an individual's skills and knowledge and support movement between the school, vocational education and higher education sectors.

Key features

Support learner transition between education sectors.

Equity requirements	Equity reviewer comments
1. What evidence demonstrates pathways from entry and preparatory level as appropriate to facilitate movement between schools and VET, from entry level into work, and between VET and higher education qualifications?	No qualifications have been presented. The *SIR Retail Services Training Package Release 4.0 Companion Volume Implementation Guide* has a section on pathways advice (section 2.4). This Guide identifies in section 2.4.4 units that are considered most appropriate for part of a VET in Schools qualification: ○ SIRXOSM001 Identify and review social media and online platforms for organisational use ○ SIRXOSM002 Maintain ethical and professional standards when using social media and online platforms ○ SIRXOSM003 Use social media and online tools.

Quality Principle 6

Support interpretation by training providers and others through the use of simple, concise language and clear articulation of assessment requirements.
Key features

Support implementation across a range of settings and support sound assessment practices.

Equity requirements	Equity reviewer comments
1. Does the Companion Volume Implementation Guide include advice about: • Pathways • Access and equity • Foundation skills? (see Training Package Standard 11)	The *SIR Retail Services Training Package Release 4.0 Companion Volume Implementation Guide* has information on pathways (section 2.4). There is also a section on *Access and Equity(section 2.9)*and a section titled *Foundation Skills* (section 2.6) which provides an explanation of these skills in the cross-sector online and social media units.
2. Are the foundation skills explicit and recognisable within the training package and do they reflect and not exceed the foundation skills required in the workplace?	The foundation skills are explicit in each unit and in all seven units there are some additional foundation skills essential to performance stated on each unit. All foundation skills adequately address the requirements needed to complete the tasks outlined in the units.

Quality Report

Section 1 – Cover page

Information required	Detail
Training Package title and code	SIR Retail Services Training Package Release 4.0
Number of new qualifications and their titles[2]	Nil
Number of revised qualifications and their titles	Nil
Number of new units of competency and their titles	7 new units of competency: SIRXOSM001 Identify and review social media and online platforms for organisational use SIRXOSM002 Maintain ethical and professional standards when using social media and online platforms SIRXOSM003 Use social media and online tools SIRXOSM004 Analyse performance of social media and online business tools SIRXOSM005 Develop a basic website for customer engagement SIRXOSM006 Develop and manage social media and online strategies SIRXOSM007 Manage risk to organisational reputation in an online setting
Number of revised units of competency and their titles	Nil

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[2] When the number of training products is high the t*itles can be presented as an attached list.*

Information required	Detail
Confirmation that the panel member is independent of: • the Training Package or Training Package components review ('Yes' or 'No') • development and/or validation activities associated with the Case for Endorsement ('Yes' or 'No') • undertaking the Equity and/or Editorial Reports for the training package products that are the subject of this quality report ('Yes' or 'No')	Yes, Tina Berghella is independent of the Training Package and its components, has not been involved in the development and validation of this Training Package and the Case for Endorsement and has not undertaken the Editorial and Equity Reports.
Confirmation of the Training Packages or components thereof being compliant with the *Standards for Training Packages 2012*	The Standards for Training Packages are met.
Confirmation of the Training Packages or components thereof being compliant with the *Training Package Products Policy*	Training Package Products Policy is met.
Confirmation of the Training Packages or components thereof being compliant with the *Training Package Development and Endorsement Process Policy*	Training Package Development and Endorsement Policy is met.
Panel member's view about whether: • the evidence of consultation and validation process being fit for purpose and commensurate with the scope • estimated impact of the proposed changes is sufficient and convincing	Yes
Name of panel member completing Quality Report	Tina Berghella, Oggi Consulting
Date of completion of the Quality Report	18th June 2019

Section 2 – Compliance with the Standards for Training Packages 2012

Standards for Training Packages	Standard met 'yes' or 'no'	Evidence supporting the statement of compliance or noncompliance (including evidence from equity and editorial reports)
Standard 1 Training Packages consist of the following: 1. AISC endorsed components: • qualifications • units of competency • assessment requirements (associated with each unit of competency) • credit arrangements 2. One or more quality assured companion volumes	Yes	The SIR Retail Services Training Package Release 4.0 Training Package components for endorsement include: • 7 units of competency and their associated assessment requirements There is also a companion volume implementation guide. No qualifications or credit arrangement are included consistent with the activity.

Standards for Training Packages	Standard met 'yes' or 'no'	Evidence supporting the statement of compliance or noncompliance (including evidence from equity and editorial reports)
Standard 2 Training Package developers comply with the *Training Package Products Policy*	Yes	The SIR Retail Services Training Package Release 4.0 components for endorsement comply with product policy as evidenced by: • Unit coding and titling and the skill sets are consistent with policy • The Equity Report confirms that training package access and equity requirements are met • The Equity Report confirms that foundation skills are sufficiently explicit and recognisable as appropriate to meet industry needs An equivalence table for units of competency has not been provided in the companion volume implementation guide. The reason documented in the companion volume implementation guide for not including the equivalence table is that all the units of competency are new and therefore no equivalence exists.
Standard 3 Training Package developers comply with the AISC *Training Package Development and Endorsement Process Policy*	Yes	The processes described in the Case for Endorsement are consistent with process policy.
Standard 4 Units of competency specify the standards of performance required in the workplace	Yes	The units specify the standards of performance required in the workplace.
Standard 5 The structure of units of competency complies with the unit of competency template	Yes	The structure of the units complies with the template. This is supported by the Editorial Report.
Standard 6 Assessment requirements specify the evidence and required conditions for assessment	Yes	The assessment requirements specify the performance and knowledge evidence and the conditions of assessment.

Standards for Training Packages	Standard met 'yes' or 'no'	Evidence supporting the statement of compliance or noncompliance (including evidence from equity and editorial reports)
Standard 7 Every unit of competency has associated assessment requirements. The structure of assessment requirements complies with the assessment requirements template	Yes	Each unit has associated assessment requirements and the structure complies with the template. This is supported by the Editorial Report. Several queries were raised during the review about the inclusion of implementation advice in the assessment conditions field. For example, SIRXOSM002 includes implementation advice about customising assessment to the learner context, interpreting the term 'customer' and types of assessment activities. The developer advised that this approach was requested and supported by industry and RTO stakeholders as a mandatory condition for assessment and did not want the text changed.
Standard 8 Qualifications comply with the Australian Qualifications Framework specification for that qualification type	NA	No qualifications included in this submission.
Standard 9 The structure of the information for the Australian Qualifications Framework qualification complies with the qualification template	NA	No qualifications included in this submission.
Standard 10 Credit arrangements existing between Training Package qualifications and Higher Education qualifications are listed in a format that complies with the credit arrangements template	NA	No qualifications, and therefore no credit arrangements, included in this submission.
Standard 11 A quality assured companion volume implementation guide produced by the Training Package developer is available at the time of endorsement and complies with the companion volume implementation guide template.	Yes	The draft companion volume implementation guide sighted in this review complies with the companion volume implementation guide template. This is supported by the Editorial Report.
Standard 12 Training Package developers produce other quality assured companion volumes to meet the needs of their stakeholders as required.	NA	No additional companion volumes were provided for this review.

Section 3 – Compliance with the training package quality principles

Note: *not all training package quality principles might be applicable to every training package or its components. Please provide a supporting statement/evidence of compliance or non-compliance against each principle.*

Quality principle 1. Reflect identified workforce outcomes

Key features	Quality principle is met: Yes / No or N/A	Evidence demonstrating compliance/non compliance with the quality principle Please see examples of evidence in the *Training Package Development and Endorsement Process Policy*
Driven by industry's needs	Yes	The Skills Service Organisation, SkillsIQ, was contracted to undertake the project on behalf of the Australian Industry and Skills Committee under Activity Order SkillsIQ/TPD_online social media CSP/2017-18/002. The changes demonstrate a clear link back to the AISC's eight cross-sector projects to address common skills needs, minimise duplication of units, consolidate existing units and remove units that are no longer being used. This work includes seven new units of competency and four new skill sets. A link to the case for change is provided in the Case for Endorsement. Evidence of links to the National Schedule and industry skills forecast could not be identified. The comprehensive description of the outcomes of the consultation and validation activities described in the Case for Endorsement also provide evidence that the work was driven by industry needs.
Compliant and responds to government policy initiatives Training package component responds to the COAG Industry and Skills Council's (CISC) training package-related initiatives or directions, in particular the 2015 training package reforms. Please specify which of the following CISC reforms are relevant to the training product and identify supporting evidence: • ensure obsolete and superfluous qualifications are removed from the system	Yes	The SIR Retail Services Training Package Release 4.0 components are responsive to Ministers' policy initiatives and, specifically, the COAG reforms to, 'improve the efficiency of the training system by creating units that can be owned and used by multiple industry sectors' and 'foster greater recognition of skill sets'. The training package is also responsive to training package policy as demonstrated in the Case for Endorsement through adherence to the Training Package Development and Endorsement Process Policy approved by the Australian Industry Skills Council in November 2016.

• ensure that more information about industry's expectations of training delivery is available to training providers to improve their delivery and to consumers to enable more informed course choices • ensure that the training system better supports individuals to move easily from one related occupation to another • improve the efficiency of the training system by creating units that can be owned and used by multiple industry sectors • foster greater recognition of skill sets		
Reflect contemporary work organisation and job profiles incorporating a future orientation	Yes	The combination of research, consultation and validation activities described in the Case for Endorsement reflect the scope and impact of the changes and provide evidence of a systematic and robust process for developing training package products that reflect contemporary workforce outcomes. Stakeholders consulted included the members of the Project Reference Group consisting of representatives from 16 Industry Reference Committees and other key stakeholders. Representatives included employers, employer groups, employee representatives, government, industry advisory bodies, training providers, and state and territory training authorities. A list of stakeholders who participated, and the consultation and validation methodology, is provided in the Case for Endorsement.

Quality principle 2: Support portability of skills and competencies including reflecting licensing and regulatory requirements

Key features	Quality principle is met: Yes / No or N/A	Evidence demonstrating compliance with the quality principle Please see examples of evidence in the *Training Package Development and Endorsement Process Policy*
Support movement of skills within and across organisations and sectors	Yes	The units are designed to be used across all industry supporting portability of skills and competencies. Four skill sets are included in this submission. They include generic information about their relationship to other training package qualifications.
Promote national and international portability	Yes	The SIR Retail Services Training Package Release 4.0 components are designed to support portability across Australian jurisdictions.
Reflect regulatory requirements and licensing	Yes	No components lead to occupational licensing, regulated or legislated outcomes. This is confirmed in the companion volume implementation guide and the Case for Endorsement.

Quality principle 3: Reflect national agreement about the core transferable skills and core job-specific skills required for job roles as identified by industry

Key features	Quality principle is met: Yes / No or N/A	Evidence demonstrating compliance with the quality principle Please see examples of evidence in the *Training Package Development and Endorsement Process Policy*
Reflect national consensus	Yes	A list of letters of support is provided in the Case for Endorsement. Several of these were sighted during this review. There are no reports by exception.
Recognise convergence and connectivity of skills	Yes	The units are specifically designed to reflect the core transferable skills associated with consumer engagement via online and social media platforms.

Quality principle 4: Be flexible to meet the diversity of individual and employer needs including the capacity to adapt to changing job roles and workplaces

Key features	Quality principle is met: Yes / No or N/A	Evidence demonstrating compliance with the quality principle Please see examples of evidence in the *Training Package Development and Endorsement Process Policy*
Meet the diversity of individual and employer needs	Yes	The units are flexibly designed to apply to individuals in all work and industry contexts. This is supported by the Equity Report.

Key features	Quality principle is met: Yes / No or N/A	Evidence demonstrating compliance with the quality principle Please see examples of evidence in the *Training Package Development and Endorsement Process Policy*
Support equitable access and progression of learners	Yes	The Equity Report confirms that training package access and equity requirements are met. This is supported by the Equity Report. Two units, SIRXOSM003 and SIRXOSM006, contain a single prerequisite unit. The inclusion of the prerequisite is supported by the Equity Report which states that the prerequisite unit is, 'logical in terms of the content and skill demands of both units'.

Quality principle 5: Facilitate recognition of an individual's skills and knowledge and support movement between the school, vocational education and higher education sectors

Key features	Quality principle is met: Yes / No or N/A	Evidence demonstrating compliance with the quality principle Please see examples of evidence in the *Training Package Development and Endorsement Process Policy*
Support learner transition between education sectors	NA	Advice is provided in the companion volume implementation guide about units of competency appropriate for VET in Schools programs. This is supported by the Equity Report.

Quality principle 6: Support interpretation by training providers and others through the use of simple, concise language and clear articulation of assessment requirements

Key features	Quality principle is met: Yes / No or N/A	Evidence demonstrating compliance with the quality principle Please see examples of evidence in the *Training Package Development and Endorsement Process Policy*
Support implementation across a range of settings	Yes	The companion volume implementation guide provides advice about training and assessment implementation across a range of settings, including detailed advice about contextualisation and simulation.

Key features	Quality principle is met: Yes / No or N/A	Evidence demonstrating compliance with the quality principle Please see examples of evidence in the *Training Package Development and Endorsement Process Policy*
Support sound assessment practice	Yes	The units and associated assessment requirements are clearly written, logically sequenced and have consistent breadth and depth. This is supported by the Equity Report. Several editorial queries were raised with the developer during this review including removing ambiguity and making foundation skills explicit. Many of these issues were addressed by the developer during the review. The remaining issues were deemed by the developer as necessary to allow a cross sector unit to be applied in a broad range of industry contexts.
Support implementation	Yes	The draft components are consistent with the required templates. This is supported by the Editorial Report. Title errors were identified and addressed during the review. The developer advised that the companion volume implementation guide will be available at the same time as the Training Package. The Case for Endorsement confirms that no implementation issues were identified or raised.

Appendix F: Cross-sector online and social media units mapped across Training Packages according to association

After a comprehensive review of Training Packages, including a thorough assessment of those Training Package Products identified in Phase 1 as potentially covering elements of online and social media skills, as well as those Units suggested by stakeholders during public consultations, a total of six existing Training Package Products have been identified as having a strong association with the cross-sector Units. Replacing these existing Units with the new cross-sector products is expected to have minimal impact.

Training Package Code	Training Package Name	Training Product Code	Training Product Name	Existing Training Package Product reviewed			Outcome of review and recommendation
				Training Package Code	Training Product Code	Training Product Name	
SIR	Retail Services	SIRXOSM001	Identify and review social media and online platforms for organisational use	ICT	ICTWEB201	Use social media tools for collaboration and engagement	Content is targeted to ICT personnel and mixed for evaluating and using platforms. Some content was brought into this cross-sector unit. **Recommendation:** No impact.
SIR	Retail Services	SIRXOSM001	Identify and review social media and online platforms for organisational use	SIR	SIRXMKT002	Use social media to engage customers	Content contained two broadly written Performance Criteria which have been extended into this cross-sector unit. **Recommendation:** No impact
SIR	Retail Services	SIRXOSM001	Identify and review social media and online platforms for organisational use	SIT	SITXEBS001	Use social media in a business	Content not relevant for this cross-sector unit. **Recommendation:** No impact
SIR	Retail Services	SIRXOSM002	Maintain ethical and professional standards when using social media and online platforms	ICT	ICTICT418	Contribute to copyright, ethics and privacy in an ICT environment	Content covers ethical issues broadly and not in context to online and social media platforms. **Recommendation:** No impact

Training Package Code	Training Package Name	Training Product Code	Training Product Name	Existing Training Package Product reviewed			Outcome of review and recommendation
				Training Package Code	Training Product Code	Training Product Name	
SIR	Retail Services	SIRXOSM002	Maintain ethical and professional standards when using social media and online platforms	ICT	ICTICT610	Manage copyright, ethics and privacy in an ICT environment	Content covers ethical issues broadly and not in context to online and social media platforms. **Recommendation:** No impact
SIR	Retail Services	SIRXOSM002	Maintain ethical and professional standards when using social media and online platforms	CHC	CHCLEG001	Work legally and ethically	Content covers ethical issues broadly and not in context to online and social media platforms. **Recommendation:** No impact
SIR	Retail Services	SIRXOSM002	Maintain ethical and professional standards when using social media and online platforms	CHC	CHCLEG003	Manage legal and ethical compliance	Content covers ethical issues broadly and not in context to online and social media platforms. **Recommendation:** No impact
SIR	Retail Services	SIRXOSM002	Maintain ethical and professional standards when using social media and online platforms	CUA	CUAPRF305	Perform in ways that respect customary law, ethics and traditions	Content covers ethical issues broadly and not in context to online and social media platforms. **Recommendation:** No impact
SIR	Retail Services	SIRXOSM003	Use social media and online tools	SIT	SITXEBS001	Use social media in a business	Content covers similar skills and knowledge areas of cross-sector unit however it does not cover a discrete workplace function. Cross-sector unit is current and future-proofed to cover similar online and social

Training Package Code	Training Package Name	Training Product Code	Training Product Name	Existing Training Package Product reviewed			Outcome of review and recommendation
				Training Package Code	Training Product Code	Training Product Name	
							media skills. **Recommendation:** Consider replacement with cross-sector unit.
SIR	Retail Services	SIRXOSM003	Use social media and online tools	SIT	SITXEB002	Develop, implement and monitor the use of social media in a business	Content does not cover the day-to-day use but instead more advanced skills areas involving developing social media plans and policies for social media use. **Recommendation:** No impact
SIR	Retail Services	SIRXOSM003	Use social media and online tools	SIR	SIRXMKT002	Use social media to engage customers	Content covers similar skills and knowledge areas of cross-sector unit however it does not cover a discrete workplace function. Cross-sector unit is current and future-proofed to cover similar online and social media skills. **Recommendation:** Consider replacement with cross-sector unit
SIR	Retail Services	SIRXOSM003	Use social media and online tools	ICT	ICTWEB201	Use social media tools for collaboration and engagement	Content is not relevant as it is a broad and introductory style unit to social media use. **Recommendation:** No impact
SIR	Retail Services	SIRXOSM004	Analyse performance of social media and online business tools	SIR	SIRXECM001	Monitor and interpret online data analytics	Content is about performance of an ecommerce site and focuses on sales which is not in scope for this cross-sector unit. **Recommendation:** No impact
SIR	Retail Services	SIRXOSM005	Develop a basic website for customer engagement	ICT	ICTWEB413	Optimise search engines	Content is very technical and focussed on solely search optimisation. **Recommendation:** No impact

Training Package Code	Training Package Name	Training Product Code	Training Product Name	Existing Training Package Product reviewed			Outcome of review and recommendation
				Training Package Code	Training Product Code	Training Product Name	
SIR	Retail Services	SIRXOSM005	Develop a basic website for customer engagement	ICT	ICTWEB417	Integrate social web technologies	Content is very technical and covers creating code and integrating a social media platform into a pre-existing website and therefore not relevant to meet the requirements of this cross-sector unit. **Recommendation:** No impact.
SIR	Retail Services	SIRXOSM005	Develop a basic website for customer engagement	ICT	ICTWEB401	Design a website to meet technical requirements	Content is specific for ICT personnel and highly technical in application. **Recommendation:** No impact.
SIR	Retail Services	SIRXOSM005	Develop a basic website for customer engagement	ICT	ICTWEB501	Build a dynamic website	Content is specific for ICT personnel and highly technical in application. **Recommendation:** No impact.
SIR	Retail Services	SIRXOSM005	Develop a basic website for customer engagement	SIT	SITXEBS003	Build and launch a small business website	Content covers similar skills and knowledge areas of cross-sector unit however it references ecommerce and shopping/electronic payment systems which the cross-sector unit does not cover as a function option. Focus of the cross-sector unit is build a 'basic' website and is applicable to multiple job roles and organisation types. **Recommendation:** Consider replacement with cross-sector unit
SIR	Retail Services	SIRXOSM006	Develop and manage social media and online strategies	BSB	BSBMKG537	Plan social media engagement	Content is focused on planning engagement activities to a target audience instead of broader-based policies and guidelines for online and social media use. Cross-sector unit covers some content of relevance.

Training Package Code	Training Package Name	Training Product Code	Training Product Name	Existing Training Package Product reviewed			Outcome of review and recommendation
				Training Package Code	Training Product Code	Training Product Name	
							Recommendation: Consider replacement with cross-sector unit.
SIR	Retail Services	SIRXOSM006	Develop and manage social media and online strategies	SIR	SIRXCEG007	Develop online customer service standards	Content covers elements of this cross-sector unit, as well as that in SIRXSM007, however it is focussed on customer service standards which is only one aspect of the cross-sector unit. **Recommendation:** No impact.
SIR	Retail Services	SIRXOSM006	Develop and manage social media and online strategies	SIR	SIRXMKT004	Undertake digital marketing activities	Content is very broad and not relevant to cross-sector unit. **Recommendation:** No impact.
SIR	Retail Services	SIRXOSM006	Develop and manage social media and online strategies	SIR	SIRXMKT006	Develop a social media strategy	Content is based on broad terms however it is highly relevant and covered by cross-sector unit. Cross-sector unit is a suitable unit to replace this as terms are better defined and skills and knowledge areas are future-proofed and applicable to multiple job roles and industries. **Recommendation:** Consider replacement with cross-sector unit.
SIR	Retail Services	SIRXOSM006	Develop and manage social media and online strategies	SIT	SITXEBS002	Develop, implement and monitor the use of social media in a business	Content is based on broad terms however it is highly relevant and covered by cross-sector unit. Cross-sector unit is a suitable unit to replace this as terms are better defined and skills and knowledge areas are future-proofed and applicable to multiple job roles and industries. **Recommendation:** Consider replacement with cross-sector unit.

Training Package Code	Training Package Name	Training Product Code	Training Product Name	Existing Training Package Product reviewed			Outcome of review and recommendation
				Training Package Code	Training Product Code	Training Product Name	
SIR	Retail Services	SIRXOSM007	Manage risk to organisational reputation in an online setting	FNS	FNSRSK602	Determine and manage risk exposure strategies	Content is very broad and not relevant to focus of cross-sector unit and online and social media platforms. **Recommendation:** No impact.
SIR	Retail Services	SIRXOSM007	Manage risk to organisational reputation in an online setting	BSB	BSBRSK501	Manage risk	Content is very broad and not relevant to focus of cross-sector unit and online and social media platforms. **Recommendation:** No impact.
SIR	Retail Services	SIRXOSM007	Manage risk to organisational reputation in an online setting	AHC	AHCBUS608	Manage risk	Content is very broad and not relevant to focus of cross-sector unit and online and social media platforms. **Recommendation:** No impact.

Appendix G: Copy of Training Package Products proposed for endorsement

SIRSS00018	Understand the use of social media for business purposes
Description	A set of skills to identify the use of social media and other online platforms for business purposes, and to identify the ethical and professional standards required to use these platforms in an organisation or business. This Skill Set is designed for use across industries.
Pathways information	Achievement of these units provides credit towards any Training Package qualification containing any of the Skill Set units of competency.
Licensing / regulatory information	No occupational licensing, certification or specific legislative requirements apply to this Skill Set at the time of publication.
Skill set requirements	<table><tr><td>Unit code</td><td>Unit title</td></tr><tr><td>SIRXOSM001</td><td>Identify and review social media and online platforms for organisational use</td></tr><tr><td>SIRXOSM002</td><td>Maintain ethical and professional standards when using social media and online platforms</td></tr></table>
Target group	Self-employed individuals, and owners and employees of any type of micro, small, medium or large organisation that utilises social media and online tools for customer engagement including commercial, not-for-profit and government organisations.
Suggested words for statement of attainment	These units of competency provide a set of skills to identify the uses of social media and other online platforms for business purposes, and to identify the ethical and professional standards required to use these platforms in an organisation or business.

SIRSS00019	Implement social media and online customer engagement
Description	A set of operational skills to implement the use of social media and other online platforms for business purposes, to maintain ethical and professional standards when using social media for an organisation or business, and to determine the effectiveness of tools in engaging customers. This Skill Set is designed for use across industries.
Pathways information	Achievement of these units provides credit towards any Training Package qualification containing any of the Skill Set units of competency.
Licensing / regulatory information	No occupational licensing, certification or specific legislative requirements apply to this Skill Set at the time of publication.

Skill set requirements	Unit code	Unit title
	SIRXOSM001	Identify and review social media and online platforms for organisational use
	SIRXOSM002	Maintain ethical and professional standards when using social media and online platforms
	SIRXOSM003	Use social media and online tools
	SIRXOSM004	Analyse performance of social media and online business tools

Target group	Self-employed individuals, and owners and employees of any type of micro, small, medium or large organisation that utilises social media and online tools for customer engagement including commercial, not-for-profit and government organisations.
Suggested words for statement of attainment	These units of competency provide a set of operational skills to implement the use of social media and other online platforms for business purposes, to maintain ethical and professional standards when using social media for an organisation or business, and to determine the effectiveness of tools in engaging customers.

SIRSS00020	Manage and implement social media and online customer engagement
Description	A set of combined operational and management skills to develop strategies for and implement the use of social media and other online platforms for business purposes. Skills include those for maintaining ethical and professional standards when using social media for an organisation or business, determining the effectiveness of tools in engaging customers, and managing risks to an organisation's reputation associated with social media and online engagement. This Skill Set is designed for use across industries.
Pathways information	Achievement of these units provides credit towards any Training Package qualification containing any of the Skill Set units of competency.
Licensing / regulatory information	No occupational licensing, certification or specific legislative requirements apply to this Skill Set at the time of publication.
Skill set requirements	**Unit code** **Unit title**

Unit code	Unit title
SIRXOSM002	Maintain ethical and professional standards when using social media and online platforms
SIRXOSM003	Use social media and online tools
SIRXOSM004	Analyse performance of social media and online business tools
SIRXOSM006	Develop and manage social media and online strategies
SIRXOSM007	Manage risk to organisational reputation in an online setting

Target group	Self-employed individuals, and owners and senior employees of any type of micro, small, medium or large organisation that utilises social media and online tools for customer engagement including commercial, not-for-profit and government organisations.
Suggested words for statement of attainment	These units of competency provide a set of skills to develop strategies for and implement the use of social media and other online platforms for business purposes.

SIRSS00021	Develop an online presence for customer engagement
Description	A set of skills to develop, implement and evaluate an organisation's online presence and to use platforms professionally and ethically. This Skill Set is designed for use across industries.
Pathways information	Achievement of these units provides credit towards any Training Package qualification containing any of the Skill Set units of competency.
Licensing / regulatory information	No occupational licensing, certification or specific legislative requirements apply to this Skill Set at the time of publication.

Skill set requirements	Unit code	Unit title
	SIRXOSM002	Maintain ethical and professional standards when using social media and online platforms
	SIRXOSM003	Use social media and online tools
	SIRXOSM004	Analyse performance of social media and online business tools
	SIRXOSM005	Develop a basic website for customer engagement
	SIRXOSM007	Manage risk to organisational reputation in an online setting

Target group	Self-employed individuals, and owners and senior employees of any type of small to medium organisation that utilises social media and online tools for customer engagement including commercial, not-for-profit and government organisations.
Suggested words for statement of attainment	These units of competency provide a set of skills to develop, implement and evaluate an organisation's online presence and to use platforms professionally and ethically.

UNIT CODE	SIRXOSM001
UNIT TITLE	Identify and review social media and online platforms for organisational use
APPLICATION	This unit describes the performance outcomes, skills and knowledge required to source information on a range of social media and online platform categories and brands and their key audiences, and to identify how different platform functions are used by organisations and their customers. This key skill underpins effective performance when selecting and utilising social media and online platforms for diverse purposes. It applies to individuals working at all levels from operational personnel through to managers. They would have already acquired information and computer technology skills sufficient to use the Internet and create basic documents. This unit applies to self-employed individuals, and owners and employees of any type of micro, small, medium or large organisation that utilises social media and online tools for customer engagement including commercial, not-for-profit and government organisations. No occupational licensing, certification or specific legislative requirements apply to this unit at the time of publication.
PREREQUISITE UNIT	Nil
COMPETENCY FIELD	Online and Social Media
UNIT SECTOR	Cross Sector

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Source information on social media and online platforms.	1.1. Identify different categories of social media and online platforms and their use. 1.2. Identify specific social media and online brands within the categories. 1.3. Gather information on the popularity and reach of categories and brands. 1.4. Determine characteristics of key audiences of categories and brands.
2. Identify functions provided by social media and online platforms.	2.1. Obtain information on platform functions used by organisations to engage with customers and to collect information. 2.2. Itemise the benefits of different platform functions to organisational use and associated costs. 2.3. Determine which functions may not be utilised by or be beneficial to organisations. 2.4. Review a range of social media sites and evaluate how organisations and users are utilising functions.
3. Identify industry specific requirements and preferences.	3.1. Identify key customer groups for whom industry products and or services are provided and their characteristics and needs. 3.2. Evaluate popularity of social media and online sites for industry's main customer groups.

	3.3. Assess the need for particular platform functions to service customer and organisational requirements.
	3.4. Identify functions which present a risk to customers.
4. Identify suitable social media and online platforms.	4.1. Identify factors that contribute to choice of social media and online platforms to meet particular organisational needs.
	4.2. Identify and rank a range of suitable platforms to meet different and complementary business needs.
	4.3. Update knowledge regularly to identify new platforms and changes to known ones.

FOUNDATION SKILLS

Foundation skills essential to performance in this unit, but not explicit in the performance criteria are listed here, along with a brief context statement.

SKILLS	DESCRIPTION
Reading skills to:	• interpret unfamiliar information of varying complexity.
Writing skills to:	• produce notes, and summarise and record information in basic documents.
Numeracy skills to:	• interpret basic statistics on the popularity and reach of social media and online platform categories and brands.
Learning skills to:	• proactively seek information to update knowledge of current and emerging social media and online platforms and function changes.
Technology skills to:	• use computers or mobile devices and the Internet to search for and download information • use software applications to create, update and store basic documents.
UNIT MAPPING INFORMATION	No equivalent unit.
LINKS	Companion Volume Implementation Guide

TITLE	Assessment Requirements for SIRXOSM001 Identify social media and online platforms for organisational use

PERFORMANCE EVIDENCE	Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:
	• source information on:
	  ◦ three different types of social media categories and provide brand examples for each type
	  ◦ three different types of online platforms and provide brand examples for each type
	• for each of the above types, provide an overview on:
	  ◦ the popularity of the different categories and reach of the particular brands
	  ◦ the basic demographic composition of key audiences for the different categories and brands
	  ◦ the key functions provided by the social media and online platforms and how an organisation would use these functions to benefit the organisation
	• for a particular industry or organisation, identify two suitable social media and one online brands and provide reasons for selection that covers:

	○ how the industry or organisation's target customer is a match to the demographic composition of key audiences of the social media and online brands ○ the particular functions that suit customer and organisation characteristics and needs including; advantages and limitations of functions ○ types of customer information that may be sensitive and how the functions protect this information - source information on one emerging social media or online platform, or a recent or proposed change for an existing platform.
KNOWLEDGE EVIDENCE	Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit: - key definitions of social media - main categories of social media and online platforms, their use, and how they differ - examples of particular brands within different categories - popularity of different categories and reach of particular brands - format and content of basic statistics for the popularity and reach categories and brands - basic demographic composition of key audiences for different social media and online platform categories and brands: ○ gender ○ age ○ education ○ employment status ○ household / individual income ○ location - how a range of audiences engage with social media and online sites generally and with organisation- based sites in particular including: typical habits, attitudes, behaviours and expectations - functions provided by social media and online platforms: ○ uploading and downloading information ○ chat facilities for provision of information ○ reply facilities for customer commentary ○ discussion facilities for specific groups ○ security of private and financial information ○ provision of data - functions provided by social media and online platforms and how to identify those: ○ used for purely social interactions and largely irrelevant to business purposes ○ useful to general business functions ○ that are provided free and those that attract a cost - how organisations use social media and online platforms: ○ marketing and advertising ○ creating relationships and brand loyalty ○ information dissemination ○ business and marketing planning

	◦ collecting data for various purposes including for product development, dissemination of targeted information and advertising content - specific to the particular industry: ◦ overview of a range of products and or services provided ◦ key customer groups that utilise those products and or services and their basic demographic characteristics and needs ◦ particular brands of social media and online platforms in popular use ◦ functions of social media and online platforms that can be of particular use in engaging industry's customers ◦ any specific risks that apply to using particular functions, including storage of sensitive information and risk of revealing this information publicly - factors that are relevant to choice of social media and online platforms for an organisation including: ◦ main brand audience and match to organisation's customer groups ◦ availability of functions that meet customer groups' needs and organisational requirements ◦ costs associated with different functions - methods that can be used to monitor trends in the use of current platforms and to identify emerging platforms: ◦ monitoring usage data and sudden upsurge or downturn in use ◦ media reports of problems / issues with brands ◦ media and provider reports of emerging platforms ◦ competitors' use of social media and online platforms.
ASSESSMENT CONDITIONS	This unit has been written to allow for application to any type of industry. Assessment must be customised according to the industry context of learners while ensuring that all skill and knowledge content is assessed, and all performance evidence is collected. This unit and Assessment Requirements references customers as a generic term throughout. However, because different industries and organisations use different terms to describe their stakeholders, learners should use terms appropriate for their industry during assessment. Assessment must ensure use of computers or mobile devices and the Internet to source information, and to access social media and online sites. Assessors must satisfy the assessor requirements nominated in the Standards for Registered Training Organisations, or their successor, and must have workplace experience where they have applied the skills and knowledge covered in this unit of competency.
LINKS	Companion Volume Implementation Guide

UNIT CODE	SIRXOSM002
UNIT TITLE	Maintain ethical and professional standards when using social media and online platforms
APPLICATION	This unit describes the performance outcomes, skills and knowledge required to source information on, and work according to, a range of ethical and professional standards when using social media and online platforms for business purposes. This key skill underpins effective performance when utilising social media and online platforms for diverse purposes. It applies to individuals working at all levels from operational personnel through to managers. This unit applies to self-employed individuals, and owners and employees of any type of micro, small, medium or large organisation that utilises social media and online tools for customer engagement including commercial, not-for-profit and government organisations. No occupational licensing, certification or specific legislative requirements apply to this unit at the time of publication.
PREREQUISITE UNIT	Nil
COMPETENCY FIELD	Online and Social Media
UNIT SECTOR	Cross-Sector

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Source information on the general impacts of social media.	1.1. Access and interpret information about the positive and negative impacts of social media. 1.2. Identify and evaluate the terms of service associated with social media platforms to identify requirements. 1.3. Determine how online harassment can occur via organisational sites and who may be targeted. 1.4. Determine how social media platforms share user information and identify impacts on users. 1.5. Evaluate ways to avoid negative impacts on users of organisational social media sites.
2. Comply with industry and organisational ethical and professional codes of conduct for online activities.	2.1. Identify industry codes of conduct, objectives and scope, and seek advice from relevant personnel on applicability to organisation. 2.2. Identify organisational online code of conduct, objectives and scope, and determine applicability to own job role. 2.3. Evaluate contents of codes of conduct and significance to own personal and work based online behaviours and communications. 2.4. Clarify content and compliance requirements of codes with relevant personnel. 2.5. Act according to professional values and principles outlined in codes, seeking advice when difficulties arise.
3. Maintain personal online presence consistent with	3.1. Determine differences between organisational and personal online presence.

organisational standards.	3.2. Clearly differentiate between representing self and organisation during online activities. 3.3. Review and ensure personal online posts and activities do not damage reputation of organisation and those associated with it.
4. Protect customer privacy and maintain confidentiality of organisational information.	4.1. Access and interpret information on privacy regulations and scope of requirements. 4.2. Identify and interpret organisational privacy policies and procedures and determine applicability to own job role. 4.3. Collect, use, maintain and protect information provided by customers and others, according to privacy regulations and organisational policies and procedures. 4.4. Obtain and comply with permissions to publish images and text representing others. 4.5. Maintain confidentiality of sensitive organisational information and confirm information that can be released before publishing.
5. Source information on copyright.	5.1. Access and interpret information on copyright to determine what is and what is not protected by copyright. 5.2. Identify copyright owner's exclusive rights to materials. 5.3. Determine permissions required to use copyright materials and how to obtain these.
6. Engage professionally with customers online.	6.1. Communicate with customers in a timely, professional and positive manner to enhance organisational reputation. 6.2. Respond to negative and potentially defamatory comments, complaints and conflicts sensitively, courteously and respectfully. 6.3. Minimise risk to self and organisational reputation by escalating conflict to relevant personnel.

FOUNDATION SKILLS

Foundation skills essential to performance in this unit, but not explicit in the performance criteria are listed here, along with a brief context statement.

SKILLS	DESCRIPTION
Reading skills to:	• interpret unfamiliar and complex information to determine regulatory requirements and organisational standards.
Writing skills to:	• produce notes and summarise and record information in basic documents produce customer responses of varying complexity, using language suitable for purpose and audience.
Learning skills to:	• proactively use opportunities to obtain and update knowledge of social media impacts and ethical and professional standards.
Technology skills to:	• use computers or mobile devices and the Internet to search for and download information • use software applications to create, update and store basic documents.
UNIT MAPPING INFORMATION	No equivalent unit.
LINKS	Link to Companion Volume Implementation Guide to be inserted.

TITLE	Assessment Requirements for SIRXOSM002 Maintain ethical and professional standards when using social media and online platforms

PERFORMANCE EVIDENCE	Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:
	
	• source and interpret information on:
	  ◦ terms of service for three different brands of social media, including information how those brands share user information
	  ◦ general impacts of social media on organisations and users, both positive and negative, from three different sources
	  ◦ cyberbullying and its impacts from three different sources
	  ◦ a suitable code of conduct for online activities relevant to the individual's current or prospective industry employment
	  ◦ an organisational code of conduct for online activities relevant to the individual's current or prospective job role, and obtain any required permissions for release
	  ◦ the overarching requirements of commonwealth privacy regulations and any applicable local state or territory privacy regulations relevant to the individual's current or prospective industry employment
	  ◦ copyright in Australia; what it protects and does not protect, exclusive rights of owners and requirements for permissions
	  ◦ defamation via social media from three different sources
	  ◦ organisational criticism via social media; either customer or employee based
	• from information collected, provide an overview evaluation of each of the above topics
	• evaluate three situations involving personal online posts that present a risk to an organisation's reputation and identify guidelines that could be used to avoid risk
	• respond professionally to customer communications covering:
	  ◦ a general product or service need, on two occasions
	  ◦ negative comment or complaint about organisational issues, products or services, on two occasions.

KNOWLEDGE EVIDENCE	Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:
	
	• at a fundamental level of understanding:
	  ◦ terms of service for common brands of social media; how they share user information and how this may impact on users
	  ◦ the general impacts of social media, both positive and negative:
	    - impacts on organisation reputation
	    - social impacts on users

	- meaning of harassment and cyberbullying and how this occurs and can escalate through use of social media - how bullying of employees and contractors can occur because of organisational connections and via organisational social media sites - organisational duty of care to protect individuals from cyberbullying and processes that can be taken to avoid and respond to incidents - the content of industry and organisational codes of conduct or policies for online activities, applicable to the individual's context and the importance in guiding ethical and professional behaviours - boundaries of personal and professional online activities - how personal posts and online presence can adversely affect organisational reputation and others associated with the organisation including: customers, suppliers, sponsors, donors etc. - methods that can be used to ensure personal posts are not assumed to be representing the organisation - a fundamental understanding of the key contents of: - commonwealth privacy law inclusive of the Australian Privacy Principles and how these regulate the collection, use, maintenance and secure storage of private customer information collected by private and government organisations - any state or territory privacy regulations relevant to the individual's industry and work context - the content of organisational privacy policies and procedures, applicable to the individual's industry context, and the importance in guiding ethical and professional behaviours - types of: - customer information generally considered to be sensitive and relevant to the individual's work context - consents used when publishing information about others and their images - organisational information generally considered to be sensitive and deemed not for public release - at a fundamental level of understanding: - what copyright protects and does not protect - who can own copyright, and procedures used by owners to identify copyright - exclusive rights that owners have over their material and how this affects use of materials by others - permissions that are required to use materials and how to obtain - meaning of defamation, slander and libel and how this occurs and can escalate through use of social media - potential personal and organisational consequences of both receiving and making defamatory comments - differences between personal and professional online communication styles and choice of language

	- principles of positive and professional online communications that enhance customer engagement and organisational reputation - types of positive language and approaches that can be used when dealing with negativity, complaints and conflicts.
ASSESSMENT CONDITIONS	This unit has been written to allow for application to any type of industry. Assessment must be customised according to the industry context of learners while ensuring that all skill and knowledge content is assessed, and all performance evidence is collected. This unit and Assessment Requirements references customers as a generic term throughout. However, because different industries and organisations use different terms to describe their stakeholders, learners should use terms appropriate for their industry during assessment. Assessment must ensure use of: - real workplace situations, or simulated activities, or case study scenarios that test aspects of this unit that involve customer communication - computers or mobile devices and the Internet to source information - terms of service published by social media brands - Australian Privacy Principles (or their successor) fact sheets - sample organisational privacy policies - sample industry and organisational documents relating to online and social media activities; including codes of conduct, policy statements or guidelines. Assessors must satisfy the assessor requirements nominated in the Standards for Registered Training Organisations, or their successor, and must have workplace experience where they have applied the skills and knowledge covered in this unit of competency.
LINKS	Companion Volume Implementation Guide

UNIT CODE	SIRXOSM003
UNIT TITLE	Use social media and online tools
APPLICATION	This unit describes the performance outcomes, skills and knowledge required to implement the use of social media and online platforms for organisational purposes. It requires the ability to identify the objectives for online communications, create and post relevant content to promote engagement with the organisation, and to engage professionally with customers. It applies to individuals who work at an operational level. They use discretion and judgement to take responsibility for work outcomes but actions are guided by plans, policies and procedures, supervisors and managers. Although an operational function, it can apply to small business owner operators who are responsible for a range of functions. This unit applies to self-employed individuals, and owners and employees of any type of micro, small, medium or large organisation that utilises social media and online tools for customer engagement including commercial, not-for-profit and government organisations. No occupational licensing, certification or specific legislative requirements apply to this unit at the time of publication.
PREREQUISITE UNIT	SIRXOSM002 Maintain ethical and professional standards when using social media and online platforms
COMPETENCY FIELD	Online and Social Media
UNIT SECTOR	Cross-Sector

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Determine organisational and communication requirements.	1.1. Access and interpret predetermined strategies and plans to guide activities. 1.2. Identify target audience and organisational objectives for social media or online communication. 1.3. Select social media and online platforms suited to communication objectives and target audience. 1.4. Access or create schedule of types and frequency of social media and online communications.
2. Prepare content.	2.1. Source and select organisational and external information to create content relevant to purpose. 2.2. Use language, style and tone suited to organisational image and target audience. 2.3. Check content for accuracy, currency and relevance for purpose. 2.4. Develop and format content in line with organisational guidelines. 2.5. Obtain required approvals before publication.
3. Utilise platform functions.	3.1. Utilise functions and templates provided by social media and online platforms to create posts. 3.2. Upload file types suited to communication requirements. 3.3. Create active links to organisational and external sites.

4. Promote engagement with organisation.	4.1. Curate and post content regularly or according to planned organisational schedule.
	4.2. Create opportunities to attract user generated content.
	4.3. Use posts during targeted campaigns.
5. Monitor sites and engage professionally with customers.	5.1. Monitor customer activity according to organisational schedule.
	5.2. Communicate with customers in a timely, professional and positive manner to enhance organisational reputation.
	5.3. Respond to negative comments and complaints sensitively, courteously and respectfully according to organisational policies and procedures.
	5.4. Refer customer negative feedback to relevant personnel according to organisational policies and procedures.

FOUNDATION SKILLS

Foundation skills essential to performance in this unit, but not explicit in the performance criteria are listed here, along with a brief context statement.

SKILLS	DESCRIPTION
Reading skills to:	• interpret detailed familiar organisational guidelines, policies and procedures
	• interpret and use relevant content from organisation documents of varying complexity.
Writing skills to:	create accurate and engaging content using language suitable for purpose and audience
Initiative and enterprise skills to:	• identify opportunities to engage customers and promote exposure of the organisation through online activities.
Planning and organising skills to:	• use plans and schedules to guide work activities and meet deadlines.
UNIT MAPPING INFORMATION	No equivalent unit.
LINKS	Companion Volume Implementation Guide

TITLE	Assessment Requirements for SIRXOSM003 Use social media and online tools
PERFORMANCE EVIDENCE	Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:
	• utilise three different types of social media or online platforms for organisational communications
	• create and post content for six different communications and collectively use at least three different types of media files
	• create and post content for a further two communications for a targeted social media or online campaign and determine links that could be used to external sites
	• monitor customer engagement with posts and respond professionally to customer communications covering:
	◦ two positive comments
	◦ two negative comments
	◦ two questions
	◦ two complaints

	• respond to two issues of complaint or negativity that require escalation to relevant personnel.

KNOWLEDGE EVIDENCE	Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:
	• organisation's core activities and customer base
	• different organisational purposes for use of social media and online platforms:
	  ◦ exposure through social media activity
	  ◦ building brand awareness, loyalty and an online community
	  ◦ marketing and advertising
	  ◦ information dissemination
	  ◦ promoting special offers and events
	• popularity of different categories and reach of particular brands of social media platforms and their key audiences
	• organisational guidelines, policies and procedures for:
	  ◦ content
	  ◦ online customer service including complaints resolution
	  ◦ privacy
	  ◦ gaining consent to publish information about others and their images
	  ◦ monitoring customer activity
	• characteristics of well written, appealing content for different social media platforms
	• functions of different social media and online platforms and how to use these to:
	  ◦ write and format text
	  ◦ upload different file types including text, PDF, photographs, videos, audio files
	  ◦ create active links
	  ◦ monitor customer activity
	  ◦ activate and respond to alerts
	  ◦ respond to customer commentary
	• principles of positive and professional online communications that enhance customer engagement and organisational reputation
	• types of positive language and approaches that can be used when dealing with negativity, complaints and conflicts
	• types of standard customer responses and when these might be used.

ASSESSMENT CONDITIONS	This unit has been written to allow for application to any type of industry. Assessment must be customised according to the industry context of learners while ensuring that all skill and knowledge content is assessed, and all performance evidence is collected. This unit and Assessment Requirements references customers as a generic term throughout. However, because different industries and organisations use different terms to

	describe their stakeholders, learners should use terms appropriate for their industry during assessment.
	
	Assessment must ensure use of:
	• real workplace situations, or simulated activities, or case study scenarios that test aspects of this unit that involve customer and supervisor communication
	• computers or mobile devices and general software programs used to produce and schedule content
	• a range of social media and online platforms with access to functions used by organisations; these can be those used by a workplace or those established by a training organisation for the purpose of assessment
	• sample organisational guidelines, policies and procedures for:
	   ◦ content
	   ◦ online customer service including complaints resolution
	   ◦ privacy
	   ◦ gaining consent to publish information about and images of others
	   ◦ monitoring customer activity.
	
	Assessors must satisfy the assessor requirements nominated in the Standards for Registered Training Organisations, or their successor, and must have workplace experience where they have applied the skills and knowledge covered in this unit of competency.

LINKS	Companion Volume Implementation Guide

UNIT CODE	SIRXOSM004
UNIT TITLE	Analyse performance of social media and online business tools
APPLICATION	This unit describes the performance outcomes, skills and knowledge required to use analytics tools to collect and analyse data on the performance of an organisation's social media and online presence. It requires the ability to evaluate and present reports on the effectiveness of tools in engaging customers. It applies to individuals who work independently or with limited guidance from others, including senior operational personnel, business unit managers and small business owner operators. This unit applies to self-employed individuals, and owners and employees of any type of micro, small, medium or large organisation that utilises social media and online tools for customer engagement including commercial, not-for-profit and government organisations. No occupational licensing, certification or specific legislative requirements apply to this unit at the time of publication.
PREREQUISITE UNIT	Nil
COMPETENCY FIELD	Online and Social Media
UNIT SECTOR	Cross-Sector

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Identify analytics tools and functions.	1.1. Obtain information on inbuilt analytics tools provided by social media and online platforms. 1.2. Search and identify external providers of analytics tools. 1.3. Identify types of available data and functions to assist with analysis. 1.4. Determine how specific data can be used to measure and improve customer engagement.
2. Collect and analyse data.	2.1. Determine data analysis needs, select analytics tools and collect and store relevant data according to organisational privacy procedures. 2.2. Filter, assess quality of data and clean data to ensure relevance to analysis. 2.3. Identify trends in quantitative performance through statistical analysis. 2.4. Evaluate qualitative information to identify patterns. 2.5. Monitor performance of social media and online presence regularly to ensure ongoing effectiveness.
3. Evaluate performance.	3.1. Assess quantitative and qualitative information against organisational objectives for use of social media and online platforms. 3.2. Determine success of online presence in engaging customers for general and targeted purposes.

| | 3.3. Create and present reports on data analysis and evaluation, and include recommendations for future improvements. |
| | 3.4. Generate reports that protect sensitive information provided by customers. |

FOUNDATION SKILLS

Foundation skills essential to performance in this unit, but not explicit in the performance criteria are listed here, along with a brief context statement.

SKILLS	DESCRIPTION
Reading skills to:	• interpret jargon specific to different types of social media and online analytics tools • interpret the intent and extract relevant content of customer opinions
Writing skills to:	• produce cohesive data analysis and evaluation reports using language suitable for purpose and audience • present factual information without ambiguity • summarise and paraphrase a variety of customer opinions without altering meaning.
Numeracy skills to:	• interpret numerical data of different complexity and complete routine calculations involving addition, subtraction, multiplication, division and percentages • extract, evaluate and interpret numerical data from tables, charts and graphs • interpret fundamental statistical information to draw conclusions.
Problem-solving skills to:	• identify and clean inaccurate, duplicative and irrelevant data.
Initiative and enterprise skills to:	• critically evaluate successes and failures of social media and online performance to suggest improvements.
Self-management skills to:	• take responsibility for performance analysis from data collection through to evaluation and report presentation.
UNIT MAPPING INFORMATION	No equivalent unit.
LINKS	Companion Volume Implementation Guide

TITLE	Assessment Requirements for SIRXOSM004 Analyse performance of social media and online business tools

PERFORMANCE EVIDENCE	Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:
	• utilise three different analytics tools for social media or other online platforms and collectively use inbuilt and external analytics tools
	• analyse, evaluate and report on the general performance of an organisation's social media or online business tools over three successive reporting periods
	• analyse, evaluate and report on the performance of an organisation's social media or online business tool when one specific communication or targeted campaign has been implemented
	• across all above analysis, evaluation and reporting activities, collectively cover:
	  ◦ page visits and how page was accessed
	  ◦ page likes or followers
	  ◦ reach of specific communication
	  ◦ engagement including; how many people liked, shared or commented on specific communications
	  ◦ day/s and time of day of engagement
	  ◦ audience demographics
	  ◦ qualitative evaluation of positive and negative comments
	  ◦ recommendations for future improvements.

KNOWLEDGE EVIDENCE	Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:
	• types of inbuilt analytics tools provided by a range of social media and online platforms
	• a range of external analytics tools which provide data for individual and multiple social media and online platforms
	• types of data available to measure customer engagement, to include:
	  ◦ page visits and how page was accessed (directly or via other sites)
	  ◦ page likes
	  ◦ followers
	  ◦ reach of specific communication
	  ◦ engagement including; how many people liked, shared or commented on specific communications
	  ◦ video views and duration of view
	  ◦ day/s and time of day of engagement
	  ◦ audience demographics

	- functions provided by analytics tools to sort, analyse and report on customer engagement - data to be filtered, removed or amended, and reasons for these actions - meanings and purposes of quantitative and qualitative data and how these are analysed and reported - customer data that can be sensitive and organisational privacy procedures used to securely store - common reasons for analysing social media and online data and how data can be used to improve customer engagement: - creating content that elicits interest - creating content for a call to action - targeting specific audiences - scheduling communications - methods used to analyse and assess data: - measuring results against overarching business objectives and key performance indicators - measuring results of a targeted campaign against objectives and expectations - comparing historical results - measuring and comparing audience demographics for general site interaction and responses to communications - measuring customer actions - identifying and measuring positive and negative customer responses - identifying themes, patterns and relationships for qualitative information - evaluating information against: - a predetermined theory; or - an external cause for customer reactions - format and inclusions of data analysis and evaluation reports - methods used in reports that protect sensitive customer information - techniques used to draw and express conclusions and recommendations.
ASSESSMENT CONDITIONS	This unit has been written to allow for application to any type of industry. Assessment must be customised according to the industry context of learners while ensuring that all skill and knowledge content is assessed, and all performance evidence is collected. This unit and Assessment Requirements references customers as a generic term throughout. However, because different industries and organisations use different terms to describe their stakeholders, learners should use terms appropriate for their industry during assessment. Assessment must ensure use of:

	• a range of social media and online platforms; these can be those used by a workplace or those established by a training organisation for the purpose of assessment • a range of inbuilt analytics tools provided by social media and online platforms • a range of external analytics tools which provide data for individual and multiple social media and online platforms • computers or mobile devices for accessing data and producing reports. Assessors must satisfy the assessor requirements nominated in the Standards for Registered Training Organisations, or their successor, and must have workplace experience where they have applied the skills and knowledge covered in this unit of competency.
LINKS	Companion Volume Implementation Guide

UNIT CODE	SIRXOSM005
UNIT TITLE	Develop a basic website for customer engagement
APPLICATION	This unit describes the performance outcomes, skills and knowledge required to plan and build a basic website suited to organisation purposes and customer requirements. It requires the ability to plan and develop both the structure and content for the site, and to test and evaluate the site before it goes live.

It covers those skills needed by an organisation that chooses to develop its own site, using website building platforms, rather than using the services of information technology specialists.

It applies to individuals who work independently or with limited guidance from others, including senior operational personnel, business unit managers and, particularly to small business owner operators.

This unit applies to self-employed individuals, and owners and employees of any type of organisation including commercial, not-for-profit and government organisations.

No occupational licensing, certification or specific legislative requirements apply to this unit at the time of publication. |
PREREQUISITE UNIT	Nil
COMPETENCY FIELD	Online and Social Media
UNIT SECTOR	Cross-Sector

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Plan website structure.	1.1. Determine website purpose, structure and style to suit target customer audience requirements. 1.2. Identify required functions, capabilities and security requirements which meet website purpose. 1.3. Determine need for interactive forms and functions to capture customer information and maximise customer interaction. 1.4. Plan layout and navigation flow for appearance, readability, links and ease of use. 1.5. Document structure to facilitate efficient development. 1.6. Research and select website building software applications and hosting services based on website requirements. 1.7. Identify current and future website functionality, and compatibility of software applications to ensure add-ons can be achieved.
2. Develop website content.	2.1 Select and evaluate information to create relevant website content consistent with organisational policy for information that can be publicly shared 2.2 Design interactive forms and user functionality to capture required information.

		2.1. Create and utilise a list of key words to promote and ensure search engine optimisation. 2.2. Use language, style and tone suited to organisational brand, image and target audience. 2.3. Select non-text content features to complement website text. 2.4. Check content for accuracy, currency and relevance.
3.	Create website pages.	3.1. Utilise functions and templates provided by website building software to create pages and effective navigation. 3.2. Select page titles and key words that reflect purpose and can be easily understood by audience. 3.3. Utilise key words throughout site to maximise traffic to website and targeted content. 3.4. Incorporate non-text content features to enhance page presentation. 3.5. Create interactive forms and functions to capture customer information and maximise interaction. 3.6. Develop linked webpages and ensure links are clearly named and unambiguous. 3.7. Use consistent design features across all pages for ease of readability and navigation. 3.8. Upload files to web hosting service according to technical requirements.
4.	Test and critically evaluate website before site goes live.	4.1. Test all website functions and navigation to confirm operational status and ease of use. 4.2. Test useability of interactive forms and functions. 4.3. Check accuracy of content and evaluate design for appeal and match to organisation image. 4.4. Run test searches to ensure key words are driving traffic to the site and targeted content. 4.5. Adjust content, design, key words and navigation flow to ensure website is fit for purpose and meets organisation image requirements.

FOUNDATION SKILLS

Foundation skills essential to performance in this unit, but not explicit in the performance criteria are listed here, along with a brief context statement.

SKILLS	DESCRIPTION
Reading skills to:	• interpret unfamiliar jargon and directions of different complexity found website platform building software • interpret the intent of and extract relevant content from organisational documents.
Writing skills to:	• produce cohesive website content using clear and detailed language suitable for purpose and audience • create content of online forms to elicit the required information using relevant headings and questions in a logical sequence.
Planning and organising skills to:	• coordinate multiple elements involved in developing a website in a logical and time efficient sequence.
Self-management skills to:	• critically evaluate own work to improve website content and functionality

	• take responsibility for development of website from information collection through to evaluation before site goes live.
UNIT MAPPING INFORMATION	No equivalent unit.
LINKS	Companion Volume Implementation Guide

TITLE	Assessment Requirements for SIRXOSM005 Develop a basic website for customer engagement
PERFORMANCE EVIDENCE	Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and: • plan for and build one basic website, to the point of publication, suited to identified purpose and customer requirements • integrate at least three of the following functions into the website structure: ◦ search facility ◦ interactive fillable forms ◦ uploading and downloading information ◦ active links to other sites ◦ links to drive navigation to featured content ◦ chat facilities for provision of information ◦ facilities for customer feedback, testimonials and commentary on content ◦ security of customer and organisational information • utilise at least four of the following design features into the website to create appeal and ease of readability and access: ◦ coloured frames and banners ◦ different fonts and colours for headings and text ◦ lists using numbers and bullet points ◦ images ◦ videos ◦ animations ◦ sound files ◦ tables, graphs or charts • test all functions and links built into the website on two different devices before the site goes live • evaluate content, design and useability, for two different devices, and identify three areas of potential change to be considered before the site goes live.
KNOWLEDGE EVIDENCE	Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit: • role of a website in the communications or marketing mix for particular types of organisations • common functions provided by basic websites and how these can be effectively used for different organisational purposes: ◦ search facility ◦ interactive fillable forms ◦ uploading and downloading information

	- active links to other sites including social media pages
- chat facilities for provision of information
- facilities for customer feedback, testimonials and commentary on content
- security of:
  - customer private and financial information including through password protection
  - images and information owned by website operator
- collection of data on traffic and user interaction with site

• a range of website building software providers including website functionality provided, advantages and disadvantages, and associated costs
• compatibility issues that can occur between different types of website building software applications
• types of available templates including how to access and build into a website
• how interactive fillable forms work and how information collected is provided to the website operator
• features of effective website layout and navigation flow
• functions that can be used to drive navigation to featured content and external web pages:
  - highlighted, coloured and underlined words
  - pop up messages
  - hyperlink text and tags in hypertext markup language (HTML)
• general principles for effective website design and how the following design features can be used to create appeal, ease of readability and access:
  - consistency across pages
  - coloured frames and banners
  - headings
  - different fonts and colours
  - lists using numbers and bullet points
  - images, videos, animations and sound files
  - tables, graphs and charts
  - navigation tabs with simple directive language relevant to purpose
• how to make web content more accessible to people with disability and they key content of published accessibility guidelines
• techniques for manipulating digital images and graphics, and their insertion into a website
• principles of search engine optimisation (SEO) and how traffic is driven to websites through use of:
  - key words and density on the page
  - organic searches |

	- features of browsers, search engines and web crawlers, and how they impact on website design, decisions and meta-tags - how web hosting services operate, a range of services offered by providers and associated costs - how to obtain and register a domain name and what services are generally included as part of registration - methods used to test newly developed websites, prior to site going live, and logical sequence of testing.
ASSESSMENT CONDITIONS	This unit and Assessment Requirements references customers as a generic term throughout. However, because different industries and organisations use different terms to describe their stakeholders, learners should use terms appropriate for their industry during assessment. Learners can develop a website for actual organisational use or one for the purposes of assessment. Assessment must ensure use of: - computers and mobile devices for the development and testing of website - website building software applications. Assessors must satisfy the assessor requirements nominated in the Standards for Registered Training Organisations, or their successor, and must have workplace experience where they have applied the skills and knowledge covered in this unit of competency.
LINKS	Companion Volume Implementation Guide

UNIT CODE	SIRXOSM006
UNIT TITLE	Develop and manage social media and online strategies
APPLICATION	This unit describes the performance outcomes, skills and knowledge required to develop and implement the overall strategy for an organisation's online presence and for individual strategies for targeted campaigns. It requires the ability to develop social media and online content guidelines, policies and procedures to implement and evaluate strategies. It applies to individuals who work at a senior level who operate independently, can have responsibility for others and are responsible for making a range of operational and strategic decisions. This unit applies to self-employed individuals, and owners and employees of any type of micro, small, medium or large organisation that utilises social media and online tools for customer engagement including commercial, not-for-profit and government organisations. No occupational licensing, certification or specific legislative requirements apply to this unit at the time of publication.
PREREQUISITE UNIT	SIRXOSM002 Maintain ethical and professional standards when using social media and online platforms
COMPETENCY FIELD	Online and Social Media
UNIT SECTOR	Cross Sector
ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Determine social media or online requirements.	1.1. Confirm core activities, customer base, organisational values and current direction. 1.2. Determine organisational objectives for use of social media and online platforms. 1.3. Assess the need for particular platform functions to service target audience and organisational requirements. 1.4. Select social media and online platforms suited to organisational objectives and target audience requirements.
2. Develop social media or online strategy.	2.1. Determine types and frequency of social media and online communications to match specific objectives. 2.2. Identify which social media and online platforms will be utilised for communications and audiences. 2.3. Establish key performance indicators and evaluation criteria to measure effectiveness of social media or online activities. 2.4. Identify methods to analyse performance and establish a schedule for regular analysis, evaluation and reporting. 2.5. Determine implementation budget, roles and responsibilities and allocate to personnel.

3. Develop content guidelines.	3.1. Determine guidelines for use of appropriate language and tone for outbound communications and customer interactions. 3.2. Develop standard responses for customer interactions. 3.3. Establish standards for use and formatting of text and images. 3.4. Determine parameters for appropriate and inappropriate content and what organisational and customer information can and cannot be published. 3.5. Establish content approvals process and designate levels of authority to personnel. 3.6. Communicate content guidelines to personnel.
4. Develop and document policies and procedures	4.1. Develop policies for customers of organisational social media and online sites. 4.2. Develop organisational policies and procedures to guide activities of personnel. 4.3. Communicate policies, procedures and expectations to personnel and customers.
5. Implement strategy.	5.1. Develop action plans for implementing overall strategy and individual campaigns. 5.2. Prepare a schedule documenting planned social media and online activities. 5.3. Identify and communicate priorities, key responsibilities, targets and timelines. 5.4. Monitor organisation's social media and online activity and drive implementation.
6. Evaluate strategy.	6.1. Assess reports on data analysis and evaluation. 6.2. Evaluate social media and online activity against strategy, key performance indicators and reports. 6.3. Determine and report on success of online presence in engaging customers for general and targeted purposes. 6.4. Monitor, regularly, changes to social media and online platform functionality to determine impacts on strategy. 6.5. Modify and continuously improve current and future strategies according to evaluation and changing platform functionality.

FOUNDATION SKILLS

Foundation skills essential to performance in this unit, but not explicit in the performance criteria are listed here, along with a brief context statement.

SKILLS	DESCRIPTION
Reading skills to:	• interpret complex and unfamiliar information.
Writing skills to:	• produce comprehensive plans, policies and procedures using clear and detailed language that can be easily understood by personnel operating at different levels of seniority • produce standard customer responses of varying complexity, using language suitable for purpose and audience.
Numeracy skills to:	• interpret fundamental statistical information from performance reports to draw conclusions.
Initiative and enterprise skills to:	• identify opportunities to engage customers and promote exposure of the organisation through online activities.

Planning and organising skills to:	• coordinate multiple elements involved in developing and implementing online strategies in a logical and time efficient sequence • produce and use cohesive action plans to guide implementation of online strategies for self and team members.
Self-management skills to:	• take responsibility for strategy development from initial planning through to implementation and evaluation • critically evaluate successes and failures of strategies to initiate improvements.
UNIT MAPPING INFORMATION	No equivalent unit.
LINKS	Companion Volume Implementation Guide

TITLE	Assessment Requirements for SIRXOSM006 Develop and manage social media and online strategies

PERFORMANCE EVIDENCE	Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:
	• develop and implement two strategies tailored to a particular organisation:
	  ◦ one overall strategy for an organisation's online presence
	  ◦ one strategy for one targeted social media or online campaign
	• evaluate and report on the performance of an organisation's social media or online strategy over three successive reporting periods
	• evaluate and report on the performance of an organisation's social media or online strategy for one targeted campaign
	• develop and communicate written content guidelines covering the following issues:
	  ◦ use of appropriate language for outbound communications and customer interactions
	  ◦ four standard responses tailored to different types of customer interactions
	  ◦ at least three types for each of the following:
	    - organisational information that can be published
	    - organisational information that cannot be published
	    - customer information that can be published
	    - customer information that cannot be published
	  ◦ four formatting standards
	  ◦ approvals process and authority
	• develop and communicate the following written policies and procedures:
	  ◦ acceptable use policy for customers of organisational social media and online sites
	  ◦ online customer service policy including complaints resolution procedures
	  ◦ privacy policy

	◦ procedure to gain consent to publish information about and images of others ◦ security policy for online activities.

KNOWLEDGE EVIDENCE	Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:
	• organisation's core activities, customer base, values and current direction
	• different organisational purposes for use of social media and online platforms:
	  ◦ exposure through social media activity
	  ◦ building brand awareness, loyalty and an online community
	  ◦ marketing and advertising
	  ◦ information dissemination
	• popularity of different categories and reach of particular brands of social media platforms and their key audiences
	• different functions provided by social media and online platforms and how the choice of platforms relates to organisational objectives
	• roles of different personnel in the implementation of social media and online activities
	• key performance indicators:
	  ◦ principles and purpose
	  ◦ importance of alignment to objectives
	  ◦ how to effectively express and document
	  ◦ how to use in conjunction with data analysis and evaluation reports to evaluate success of online strategy
	• common formats and styles for:
	  ◦ content guidelines and style guides
	  ◦ policies and procedures
	  ◦ action plans and schedules
	• purpose and typical inclusions of a range of customer and staff focussed guidelines, policies and procedures:
	  ◦ content guidelines
	  ◦ acceptable use for users of organisational social media and online sites
	  ◦ online customer service including complaints resolution
	  ◦ privacy
	  ◦ gaining consent to publish information about and images of others
	  ◦ security for online activities
	• for the particular industry, examples of best practice online policies and procedures including any templates issued by industry associations and other bodies
	• for standard customer responses:
	  ◦ purpose
	  ◦ commonly used responses
	  ◦ when different types would be used.

ASSESSMENT CONDITIONS	This unit has been written to allow for application to any type of industry. Assessment must be customised according to the industry context of learners while ensuring that all skill and knowledge content is assessed, and all performance evidence is collected.
	This unit and Assessment Requirements references customers as a generic term throughout. However, because different industries and organisations use different terms to describe their stakeholders, learners should use terms appropriate for their industry during assessment.
	Assessment must ensure use of:
	• comprehensive information about the operation of a real or simulated organisation to determine its characteristics and needs for the development of tailored social media or online strategies, guidelines, policies and procedures
	• real workplace performance data, or data for a simulated organisation to allow evaluation of an organisation's social media or online strategies
	• real workplace situations, or simulated activities, or case study scenarios that test aspects of this unit that involve team communication
	• computers and general software programs used to produce system documents
	• a range of social media and online platforms with access to functions used by organisations; these can be those used by a workplace or those established by a training organisation for the purpose of assessment.
	Assessors must satisfy the assessor requirements nominated in the Standards for Registered Training Organisations, or their successor, and must have workplace experience where they have applied the skills and knowledge covered in this unit of competency.
LINKS	Link to Companion Volume Implementation Guide to be inserted.

UNIT CODE	SIRXOSM007
UNIT TITLE	Manage risk to organisational reputation in an online setting
APPLICATION	This unit describes the performance outcomes, skills and knowledge required to develop and implement processes for managing risks to an organisation's reputation associated with social media and online engagement, including the impacts of online negative commentary, complaints and criticism. It requires the ability to develop a social media crisis management plan and other processes to monitor and respond to issues and incidents. It applies to individuals who work at a senior level who operate independently, can have responsibility for others and are responsible for making a range of operational and strategic decisions. This unit applies to self-employed individuals, and owners and employees of any type of micro, small, medium or large organisation that utilises social media and online tools for customer engagement including commercial, not-for-profit and government organisations. No occupational licensing, certification or specific legislative requirements apply to this unit at the time of publication.
PREREQUISITE UNIT	Nil
COMPETENCY FIELD	Online and Social Media
UNIT SECTOR	Cross-Sector
ELEMENTS	**PERFORMANCE CRITERIA**
Elements describe the essential outcomes	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Identify risks to organisational reputation and plan control measures.	1.1. Identify risks to organisational reputation associated with social media and online presence, including any security risks. 1.2. Develop social media and online crisis management plan to deal with damaging issues and incidents.
2. Establish processes for monitoring customer commentary, feedback and criticism.	2.1. Determine a schedule for monitoring organisation's social media and online sites and external review pages. 2.2. Allocate responsibility to personnel or external providers for consistently and regularly monitoring sites. 2.3. Register organisation for alerts provided by social media and review platforms. 2.4. Establish a schedule for analysing online performance using analytics tools.
3. Develop policies and procedures for response.	3.1. Establish standards for use of appropriate language and tone for responding to both positive and negative comments. 3.2. Develop standard responses that can be used for common circumstances. 3.3. Designate response times in policies and procedures.

	3.4. Allocate responsibility for responding to customer commentary, feedback, complaints and criticism.
	3.5. Determine when customer compliments, complaints and criticism should be referred to managers.
	3.6. Communicate policies, procedures and expectations to personnel.
4. Manage organisational reputation.	4.1. Take responsibility for resolution of complex and difficult customer interactions.
	4.2. Utilise functions provided by social media and review platforms to manage persistent and damaging interactions.
	4.3. Assess performance reports regularly to identify systematic communication issues and implement improvements.
	4.4. Assess escalating issues and implement crisis management processes to minimise impacts.

FOUNDATION SKILLS

Foundation skills essential to performance in this unit, but not explicit in the performance criteria are listed here, along with a brief context statement.

SKILLS	DESCRIPTION
Reading skills to:	• interpret the intent and extract relevant content of customer opinions expressed with differing levels of clarity.
Writing skills to:	• produce comprehensive plans, policies and procedures using clear and detailed language that can be easily understood by personnel operating at different levels of seniority • produce customer responses of varying complexity, using language suitable for purpose and audience.
Numeracy skills to:	• interpret fundamental statistical information from performance reports to draw conclusions.
Self-management skills to:	• critically analyse issues and incidents to determine appropriate individual and systematic responses.
UNIT MAPPING INFORMATION	No equivalent unit.
LINKS	Companion Volume Implementation Guide

TITLE	Assessment Requirements for SIRXOSM007 Manage risk to organisational reputation in an online setting
PERFORMANCE EVIDENCE	Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and: • for a particular organisation, identify significant risks to reputation and develop one social media and online crisis management plan to deal with potential damaging issues and incidents • develop and communicate written policies and procedures covering all of the following issues: ◦ schedule for monitoring social media and online, and external review pages ◦ schedule for analysing and assessing online performance data

	◦ designated response times for customer compliments, complaints, negative commentary and bad reviews ◦ standard responses that can be used for common circumstances, including holding responses ◦ guidelines on the use of appropriate language for responding to positive and negative comments ◦ issues that should be escalated and referred to managers ◦ guidelines for removing comments, and reporting, blocking and banning users - respond to customer communications covering: ◦ two escalated complaints, giving consideration to previous organisational communications, and take measures to resolve ◦ two bad reviews - implement crisis management processes in response to one crisis, including allocation of responsibilities to personnel.
KNOWLEDGE EVIDENCE	Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit: - common risks to an organisation's reputation in an online setting: ◦ customer complaints in a public setting ◦ bad reviews ◦ untrue or highly exaggerated comments about a customer and organisation interaction ◦ criticism of organisation's brand, values, products or services ◦ commentary by others not involved but supporting complainants or showing bias ◦ comments that accuse organisation of illegal acts ◦ online personal communications of others associated with the organisation that are incompatible with organisation's brand values and image including: staff, contractors, suppliers, sponsors, donors etc. ◦ overt or implied criticism of the organisation by current or past personnel ◦ online attacks by activists deliberately targeting the organisation - common security risks: ◦ hacking of accounts ◦ spam messages and content with dangerous links ◦ threats to property, personnel and others associated with the organisation - specific to the particular industry, types of reputational and security risks - common formats and inclusions of policies and procedures - for crisis management: ◦ difference between a problem and a crisis and common crisis scenarios ◦ format and common inclusions of social media crisis management plans

	◦ typical actions taken by organisations during a crisis response ◦ roles typically allocated to personnel at different levels of seniority and to external providers - analytics functions provided by social media and review platforms that can assist in identifying and managing risk to organisational reputation - monitoring and alert functions provided by social media and review platforms and how these operate - reasons to consistently monitor social media and review sites and common schedules - types of monitoring services offered by external providers and benefits of engaging - the importance of timely responses for: ◦ managing complaints and negative reviews ◦ answering enquiries to avoid complaints ◦ compliments to ensure customer feels valued, not ignored and how responses can add value to reputation - types of standard responses that can be provided and the role of a holding response - organisational chain of command for responding to and managing: ◦ compliments ◦ complaints and criticism ◦ crises - reasons for and advantages of resolving complaints off line - functions provided by social media and review platforms to manage persistent and damaging interactions, how these operate and factors to consider before implementing: ◦ removal of comments ◦ reporting ◦ blocking and banning users - signs, stages and levels of conflict, and techniques used to resolve at various stages of escalation - principles of positive and professional online communications that minimise risk to organisational reputation - types of positive language and approaches that can be used when dealing with negativity, complaints and conflicts.
ASSESSMENT CONDITIONS	This unit has been written to allow for application to any type of industry. Assessment must be customised according to the industry context of learners while ensuring that all skill and knowledge content is assessed, and all performance evidence is collected. This unit and Assessment Requirements references customers as a generic term throughout. However, because different industries and organisations use different terms to describe their stakeholders, learners should use terms

	appropriate for their industry during assessment. Assessment must ensure use of: • real workplace situations, or simulated activities, or case study scenarios that test aspects of this unit that involve customer and team communication • computers and general software programs used to produce system documents and schedules • a range of social media and online platforms with access to functions used by organisations including monitoring and alert functions; these can be those used by a workplace or established by a training organisation for the purposes of assessment • analytics tools and reports provided by social media and online platforms. Assessors must satisfy the assessor requirements nominated in the Standards for Registered Training Organisations, or their successor, and must have workplace experience where they have applied the skills and knowledge covered in this unit of competency.
LINKS	Companion Volume Implementation Guide