



**Australian Government**

# **Assessment Requirements for BSBCUE306 Process complex accounts**

**Release: 1**

# Assessment Requirements for BSBCUE306 Process complex accounts

## Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 1.0.

## Performance Evidence

Evidence of the ability to:

- develop options for meeting customer default enquiries
- determine need for appropriate escalation if required
- consult with customer to negotiate practical solutions and agreement to payment arrangements
- implement an appropriate and timely debt-recovery process in compliance with relevant legislation, regulatory standards and organisational policy.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

## Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- explain conflict resolution and negotiation techniques to facilitate effective resolution of customer service issues and general customer service protocols
- explain escalation processes
- outline legislative, regulatory and industry code requirements relating to account processing requirements
- explain organisational billing and credit procedures
- identify organisational financial delegations and authorisation limits
- identify product and service charges
- outline risk assessment and management principles.

## Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the stakeholder relations – customer engagement field of work and include access to:

- workplace information, reporting systems and data
- information on relevant legislation, regulations, codes of practice and standards
- information on organisational policies and standard operating procedures, financial delegations and authorisation limits
- case studies or actual workplace.

Assessors must satisfy NVR/AQTF assessor requirements.

## Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>