



**Australian Government**

**Assessment Requirements for FNSBNK411  
Coordinate small business customer  
portfolios**

**Release: 1**

## Assessment Requirements for FNSBNK411 Coordinate small business customer portfolios

### Modification History

Release	Comments
Release 1	<p>This version first released with the FNS Financial Services Training Package Version 8.0.</p> <p>Supersedes and is equivalent to FNSBNK401 Coordinate a small business customer portfolio.</p>

### Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- coordinate at least one small business portfolio and provide effective banking solutions for at least one customer.

In the course of the above, the candidate must:

- use organisational systems and reports to identify, document and evaluate customer banking needs.

### Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- customer usage patterns and potential service and product options in relation to banking and portfolio needs
- key characteristics of small business customer motivations, targets and goals
- financial products and services, and their benefits and applications for small business customers
- key features of organisational systems, policies, procedures and business rules relevant to delivering banking services to small business customers
- key principles of customer relationship marketing in relation to developing service strategy for engaging small businesses in banking services
- organisational referral processes and their correlation with customer satisfaction
- type of information accessed from organisational systems to assist in identifying and addressing customer needs

- banking industry reward and recognition strategies in the application to small business customers and customer loyalty strategies
- key small business legislative and reporting requirements relevant to small business customers and related banking portfolios.

## **Assessment Conditions**

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- office equipment, technology, software and consumables
- organisational records, policies and procedures.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

## **Links**

Companion Volume Implementation Guide is found on VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe>