Australian Government

FNSCUS502 Monitor client requirements

Release: 1

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Modification History

Release	Comments
Release 1	This version first released with FNS Financial Services Training Package Version 1.0.

Application

This unit describes the skills and knowledge required to collect and analyse client information, use it as the basis for determining the level of contact required and monitor and maintain the quality of the service provided.

It applies to individuals who may use a range of specialised and managerial techniques to plan, monitor and review their work in any sector of the financial services industry.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Customer service

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	*Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Determine client needs	1.1 Collect comprehensive information on clients using appropriate means and in compliance with guidelines 1.2 Review records regularly to ensure information is current and maintain complete records of risks assessed and action taken 1.3 Monitor effectiveness of guidelines and adjust as required
2. Establish communication with clients	2.1 Apply service guidelines to determine level of client contact required 2.2 Formalise communication where interests of organisation and client need to be protected 2.3 Establish regular communication within guidelines and based

ELEMENT	PERFORMANCE CRITERIA
	on client needs
3. Identify and review information	3.1 Identify and gather categories of information relevant to service provided
	3.2 Monitor business environment to identify need to amend information services, and establish mechanisms to select and filter information efficiently
	3.3 Determine and maintain information relevant to client requirements on an ongoing basis

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

Skill	Performance Criteria	Description
Reading	1.1-1.3, 2.1, 3.1- 3.3	• Identifies and interprets information from a range of sources and assesses it for compliance and relevance • Monitors and reviews information on a regular basis for accuracy and for its effectiveness in meeting client and organisational needs
Writing	1.1, 1.2, 1.3, 2.2, 2.3, 3.2	• Uses a range of text types to accurately document and convey logically structured, relevant information
Oral Communication	1.1, 2.2, 3.3	• Clearly explains detailed information using language, tone and pace appropriate to audience • Initiates effective spoken interactions using appropriate listening and questioning techniques to establish and identify client needs
Navigate the world of work	1.1, 1.3, 2.1, 2.3	• Observes compliance requirements in relation to client requirements
Interact with others	1.1, 2.2, 2.3, 3.3	• Selects and uses appropriate conventions and protocols when communicating with clients to build rapport, seek clarification or share information
Get the work done	1.1-1.3, 2.1, 2.3, 3.1-3.3	• Accepts responsibility for planning, prioritising and sequencing tasks and workload • Monitors and reviews client information systems and processes to inform decisions about the need for modifications or improvements

		• Uses problem-solving processes to address client monitoring issues • Uses digital technologies and tools to access, store and share information

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
FNSCUS502 Monitor client requirements	FNSCUS502A Monitor client requirements	Updated to meet Standards for Training Packages Minor edits to clarify performance criteria	Equivalent unit

Links

Companion Volume implementation guides are found in VETNet - https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe