



**Australian Government**

# **FNSRTS311 Provide customer service in a retail agency**

**Release: 1**

## FNSRTS311 Provide customer service in a retail agency

### Modification History

| Release   | Comments                                                                              |
|-----------|---------------------------------------------------------------------------------------|
| Release 1 | This version first released with FNS Financial Services Training Package Version 4.0. |

### Application

This unit describes the skills and knowledge required to apply customer service skills and process financial services transactions in non-financial services organisations that act as an agency.

It applies to individuals who, within their level of responsibility, use clear communication skills to provide up-to-date and accurate information and follow procedures to process transactions.

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

### Unit Sector

Financial retail services

### Elements and Performance Criteria

| ELEMENT                                          | PERFORMANCE CRITERIA                                                                                                                                                                                                                                                                |
|--------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>Elements describe the essential outcomes.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>                                                                                                                                                                              |
| 1. Represent financial services institution      | 1.1 Confirm role and purpose of agency in providing services on behalf of financial services institution<br>1.2 Obtain required documentation about products and services of financial services institution<br>1.3 Develop and maintain knowledge of required products and services |
| 2. Identify and address customers' needs         | 2.1 Identify whether customer is dissatisfied and follow the procedures set by the organisation to address dissatisfaction if required<br>2.2 Respond to customer requests within limits of agency authorisation                                                                    |

| ELEMENT                          | PERFORMANCE CRITERIA                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|----------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                  | 2.3 Refer requests that require information, advice, products and services that fall outside agency level of authorisation and knowledge to applicable financial services institution<br>2.4 Assist customers to complete documents and transaction forms                                                                                                                                                                                                                                                |
| 3. Process customer transactions | 3.1 Verify customer identity using established security checking procedures<br>3.2 Check information provided by customers for accuracy and completeness<br>3.3 Refer customer queries or complaints that are outside agency's level of authorisation or knowledge to financial services institution for resolution<br>3.4 Complete transactions following protocols and processes of financial services institution<br>3.5 Routinely conduct reconciliation of monies received with transaction records |

## Foundation Skills

*This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.*

| Skill              | Description                                                                                                                                                                                                                                                                                                                                                                          |
|--------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Reading            | <ul style="list-style-type: none"> <li>Accesses information from a range of sources and interprets documents to confirm and determine requirements</li> </ul>                                                                                                                                                                                                                        |
| Writing            | <ul style="list-style-type: none"> <li>Completes forms and transaction records, using correct spelling and grammar</li> </ul>                                                                                                                                                                                                                                                        |
| Oral Communication | <ul style="list-style-type: none"> <li>Participates in verbal exchanges using active listening and questioning to determine requirements</li> <li>Interacts in courteous manner when communicating with customers</li> <li>Clearly explains and clarifies information using language, tone and pace intended to the audience and purpose</li> </ul>                                  |
| Numeracy           | <ul style="list-style-type: none"> <li>Uses mathematical equations to undertake basic financial transaction calculations</li> </ul>                                                                                                                                                                                                                                                  |
| Self-management    | <ul style="list-style-type: none"> <li>Understands the purpose of own role and associated responsibilities, and follows organisational procedures and protocols for customer service provision</li> <li>Makes routine decisions and implements standard procedures for routine tasks and predictable problems, recognising when referral to higher authority is necessary</li> </ul> |

| Skill      | Description                                                                                                                                                                                                                                                  |
|------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|            | <ul style="list-style-type: none"><li>• Demonstrates resilience during and after challenging conversations and interactions with customers</li><li>• Plans and sequences routine tasks and workload, seeking clarification from others as required</li></ul> |
| Technology | <ul style="list-style-type: none"><li>• Uses familiar digital technologies and systems to access information, search and enter data, and communicate with others</li></ul>                                                                                   |

## Unit Mapping Information

Supersedes and is equivalent to FNSRTS301 Provide customer service in a retail agency.

## Links

Companion Volume Implementation Guide is found on VETNet -

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