



Australian Government

Department of Education, Employment and Workplace Relations

FNSPIM409A Maintain customer relationship

Revision Number: 1

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Modification History

Not applicable.

Unit Descriptor

Unit descriptor	<p>This unit describes the performance outcomes, skills and knowledge required to maintain an ongoing relationship with customers and retain the business within the personal injury management sector. It encompasses applying a range of organisation and interpersonal skills in one to one interactions or for supporting organisation procedures and strategies for retaining and enhancing the customer relationship.</p> <p>This unit may apply to job roles subject to licensing, legislative, regulatory or certification requirements so Commonwealth, State or Territory requirements should be confirmed with the relevant body.</p>
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Application of the Unit

Application of the unit	<p>This unit applies to job roles in the personal injury management sector and may also be applied to other sectors of the financial services industry where maintaining databases of customer information and are not restricted by the Privacy Act.</p>
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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.
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Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.
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Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Maintain records of customer interaction	1.1. Customer information is collected and checked with existing records 1.2. Records of customer interaction are kept up to date 1.3. Records of customer interaction maintained in accordance with <i>organisation procedures and relevant legislation</i>
2. Provide ongoing customer service	2.1. Previous interactions with customers are reviewed 2.2. <i>Steps are taken to determine customer satisfaction</i> with the product and/or service provided 2.3. Any problems are resolved or referred to relevant personnel 2.4. Areas where problems occur are recorded and information provided to management
3. Maintain regular communication with customers	3.1. Communication is based on information about customer needs 3.2. Effective regular communication is established with customers 3.3. Level of communication is appropriate to customer's requirements
4. Offer additional benefits to customers	4.1. Additional benefits are offered to customers based on analysis of customer records 4.2. Opportunities for relationship marketing, cross-product or service marketing, or additional product or service marketing opportunities are identified and acted upon or advised to relevant persons 4.3. Responses to customer requests are designed to maximise customer satisfaction

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- highly developed communication skills to:
 - determine and confirm information, using questioning and active listening as required
 - written and verbal communication, including receiving feedback
 - liaise with others, share information, listen and understand
 - use language and concepts appropriate to cultural differences
- numeracy and IT skills to:
 - access and update records electronically
 - use internet information
- literacy skills to read and interpret documentation from a variety of sources and record and consolidate relevant related information
- effective interpersonal skills
- organisation skills, including the ability to plan and sequence work
- analytical skills
- negotiation skills
- networking skills

Required knowledge

- industry and organisation codes of practice, policy and operating procedures
- current knowledge of organisation's products and services
- databases and computer systems
- relevant legislation
- marketing and sales techniques

Evidence Guide

EVIDENCE GUIDE	
<p>The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.</p>	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	<p>Evidence of the ability to:</p> <ul style="list-style-type: none"> • retain and enhance customer relationships through a range of organisation and interpersonal techniques, knowledge and skill • consider and adapt to any special needs of customers, including cultural, language, race, religion, ethnic origin, socioeconomic status and demographic needs.
Context of and specific resources for assessment	<p>Assessment must ensure:</p> <ul style="list-style-type: none"> • competency is demonstrated in the context of the work environment and conditions specified in the range statement either in a relevant workplace or a closely simulated work environment • access to and the use of a range of common office equipment, technology, software and consumables • access to organisation records • access to organisation policies and procedures.
Method of assessment	<p>A range of assessment methods should be used to assess practical skills and knowledge. The following examples, in combination, are appropriate for this unit:</p> <ul style="list-style-type: none"> • evaluating an integrated activity, which combines the elements of competency for the unit, or a cluster of related units of competency • observing processes and procedures in workplaces • verbal or written questioning on underpinning knowledge and skills • evaluating samples of work • accessing and validating third party reports • setting and reviewing workplace projects and business simulations or scenarios.
Guidance information for assessment	

Range Statement

RANGE STATEMENT	
<p>The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.</p>	
<p><i>Organisation procedures and relevant legislation</i> may include:</p>	<ul style="list-style-type: none"> • anti-discrimination legislation • Consumer Credit Code • customer charter • industry codes of practice • Privacy Act.
<p><i>Steps taken to determine customer satisfaction</i> may include:</p>	<ul style="list-style-type: none"> • customer mail questionnaire • follow-up phone calls • phone questionnaire or survey.

Unit Sector(s)

Unit sector	Personal injury management
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Competency field

Competency field	
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Co-requisite units

Co-requisite units		