



Australian Government

BSBCUE306 Process complex accounts

Release: 1

BSBCUE306 Process complex accounts

Modification History

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

Application

This unit describes the skills and knowledge required to handle difficult engagements relating to customer billing and customer accounting, primarily where the customer is defaulting.

It applies to individuals who apply a broad range of competencies in a varied work context, using some discretion and judgment and relevant theoretical knowledge, and who may provide technical advice and support to a team.

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

Unit Sector

Stakeholder Relations – Customer Engagement

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 Receive and review a customer default enquiry or case	1.1 Receive and review customer enquiry to identify details of case 1.2 Obtain additional information to assist in resolving case 1.3 Review options to resolve case with other staff members, where appropriate 1.4 Obtain specialist and team member advice, and escalate where necessary 1.5 Consider eligibility for hardship program 1.6 Observe relevant legislation, codes, regulations and standards 1.7 Develop initial advice to be given to customer
2 Negotiate payment with	2.1 Consult with customer on suggested course of action and

ELEMENT	PERFORMANCE CRITERIA
defaulting customers	options 2.2 Assess customer response to consultation 2.3 Develop realistic settlement options giving consideration to policy, customer response and payment history 2.4 Offer and agree on a payment option with customer according to organisational policy 2.5 Record revised payment options as agreed with customer and according to organisational procedures
3 Advise defaulting customers of cancellation	3.1 Advise defaulting customers of service or product cancellation 3.2 Negotiate successful product return with customer where appropriate 3.3 Explain debt-recovery process to customer 3.4 Initiate debt-recovery process
4 Manage default actions	4.1 Follow up payment, debt recovery or product return to ensure completion of case 4.2 Amend customer records according to organisational procedures 4.3 Follow organisational default and credit-management procedures

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	Recognises and interprets textual information from relevant sources to determine customer requirements and position
Writing	1.7, 2.5, 4.2	- Prepares specific information which conveys an understanding of alternatives and outcomes - Records details and amends workplace documentation
Oral Communication	1.2-1.4, 2.1, 2.4, 3.1-3.3	Articulates clearly using specific and relevant language suitable to audience to convey requirements, and uses listening and questioning to confirm

		understanding
Numeracy	1.1, 1.5, 2.4	- Interprets numerical information to determine financial position of customer - Uses basic calculation methods to determine payment amount and frequency
Navigate the world of work	1.6, 2.4, 2.5, 4.2, 4.3	Takes personal responsibility for adherence to legislative and organisational requirements relevant to processing default accounts
Interact with others	1.3, 1.4, 2.1-2.4, 3.1-3.4	- Selects and uses appropriate conventions and protocols when discussing debt recovery and default matters with colleagues and customers - Assesses customer response to options and outcomes to avoid misunderstanding and negotiates mutual agreement
Get the work done	1.5, 1.7, 2.2, 2.3, 2.5, 3.4, 4.1, 4.3	- Organises workload logically and systematically to undertake clearly defined tasks of varying complexity in cooperation with colleagues and customers - Uses systematic, analytical processes to make decisions about customer default positions; setting goals, gathering relevant information, and identifying and evaluating options against criteria - Uses familiar digital systems and tools to access, organise, analyse and display information relevant to payment options and customer records

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBCUE306 Process complex accounts	BSBCCO306B Process complex accounts	Updated to meet Standards for Training Packages Code changed to reflect industry practice	Equivalent unit

Links

Companion Volume implementation guides are found in VETNet -

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

Assessment Requirements for BSBCUE306 Process complex accounts

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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

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