



Australian Government

FNSBNK404 Promote mobile banking services

Release: 1

FNSBNK404 Promote mobile banking services

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 identify clients who would benefit from mobile banking services and develop promotional tools and techniques to introduce the service.

It applies to individuals who work within a team and have responsibility for implementing and promoting strategic activities to build business.

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

Unit Sector

Banking

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. Establish client needs	1.1 Identify clients who would benefit from mobile banking services 1.2 Analyse communication techniques for informing clients about mobile banking services 1.3 Develop contact procedures for clients
2. Develop promotional tools	2.1 Identify appropriate mobile banking service model 2.2 Analyse promotional concepts for mobile banking to individual clients 2.3 Identify or develop suitable promotional tools and techniques for mobile banking services

ELEMENT	PERFORMANCE CRITERIA
	2.4 Produce documentation to assist in promotional activities consistent with organisational policy and standards
3. Introduce promotional tools and techniques to sales team	3.1 Provide team members with information on promoting mobile banking services 3.2 Address queries on techniques and tools to ensure team members are proficient in dealing with queries, in accordance with relevant standards and organisational policy and procedures 3.3 Complete documentation for agreements on providing mobile banking services to clients to appropriate standards as set out in quality control documentation

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, 1.2, 2.1, 2.2, 2.3, 2.4	Accesses and analyses key features of information from a range of sources to address specific criteria and determine requirements
Writing	1.3, 2.3, 2.4, 3.1-3.3	- Prepares information and completes documentation using appropriate formats and structures for the audience and purpose - Uses clear and concise language, incorporating correct spelling and grammar and avoiding industry jargon, to convey accurate information
Oral Communication	3.1, 3.2	- Participates in verbal exchanges of information using language, tone and pace appropriate to the audience and purpose - Uses active listening and questioning to clearly convey information, elicit feedback and confirm understanding with a range of stakeholders
Numeracy	3.3	Performs mathematical calculations to check data accuracy and consolidate financial information
Navigate the world of work	2.4, 3.2, 3.3	Incorporate organisational policy, procedures and standards in all activities and documentation
Get the work	1.1-1.3, 2.1-2.4,	Sequences and schedules complex activities, monitors implementation and manages relevant communication

done	3.1-3.3	• Automatically implements standard procedures for routine decisions • Develops ideas and products following analysis of complex information and data • Uses a range of digitally based technologies and software packages, including spreadsheets, databases and the internet
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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
FNSBNK404 Promote mobile banking services	FNSBNK404A Promote mobile banking services	Updated to meet Standards for Training Packages	Equivalent unit

Links

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

Assessment Requirements for FNSBNK404 Promote mobile banking services

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Performance Evidence

Evidence of the ability to:

- apply current knowledge of mobile banking products and services to identify potential clients
- contribute to developing new tools and documentation to promote mobile banking services
- adhere to organisational marketing guidelines and rules when developing promotional tools, techniques and documentation
- follow organisational procedures and privacy principles when developing communication techniques and using client information for marketing purposes
- communicate information on promoting mobile banking services with team members.

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:

- analyse and describe the key client motivations, needs and wants relating to mobile banking
- describe the key features of organisational policy and procedures related to mobile banking services and products
- outline the key characteristics and conditions of similar products available in the industry
- explain the key features of the requirements of relevant financial services legislation
- describe the key features of relevant financial documents relating to mobile banking products and services, including:
 - brochures
 - fact sheets
- compare and contrast promotion and selling techniques.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the banking field of work and include access to:

- office equipment, technology, software and consumables
- mobile banking service information.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

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