



Australian Government

FNSBNK405 Provide mobile banking sales and services

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 sell mobile banking services to clients and provide follow-up service.

It applies to individuals who use specialised knowledge, products and techniques to build the organisation's business and maintain clients.

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. Sell mobile banking services	1.1 Address client enquiries for mobile banking services in prompt manner 1.2 Identify and confirm benefits of mobile banking services for client
2. Explain mobile banking service features	2.1 Explain mobile services to clients in clear and unambiguous way, avoiding jargon and in language appropriate to receiver 2.2 Answer all client queries promptly and accurately and, where applicable, provide initial documentation to clients setting out mobile banking services 2.3 Inform clients clearly about any restrictions that may apply to mobile banking services

ELEMENT	PERFORMANCE CRITERIA
	2.4 Explain mobile banking service details to clients clearly and accurately, using questioning to confirm understanding
3. Complete mobile banking service agreements	3.1 Assist clients to make informed choices on mobile banking services, with advice provided in strict accordance with regulatory restrictions and organisational policy 3.2 Discuss and explain recommendations to clients in clear and unambiguous way 3.3 Complete and process documentation to provide mobile banking services to client accounts according to organisational requirements
4. Provide follow-up service	4.1 Contact new mobile banking clients to obtain comments about using service 4.2 Respond to problems in using service promptly and effectively 4.3 Provide advice on better use of service as required

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, 3.1, 3.3	Interprets textual information from a range of sources to make comparisons and to determine critical features and required action
Writing	1.1, 1.2, 3.1, 3.3, 4.1-4.3	- Completes business documentation accurately and legibly, following organisational procedures and protocols - Uses clear and concise language, incorporating correct spelling and grammar and avoiding unnecessary industry jargon, to convey accurate information
Oral Communication	1.1, 1.2, 2.1-2.4, 3.1, 3.2, 4.1-4.3	- 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
Numeracy	3.1-3.3	Uses mathematical equations to perform calculations and check for accuracy in financial and numerical

		information
Navigate the world of work	3.1, 3.3	Recognises and follows business rules and protocols and meets expectations associated with own role
Interact with others	3.1, 3.2, 4.1	- Recognises the importance of building rapport to establish and maintain effective working and client relationships - Adapts personal communication style to show respect for the values, beliefs and cultural expectations of others
Get the work done	1.1, 1.2, 2.1-2.4, 3.1-3.3, 4.1-4.3	- Takes responsibility for own workload and sequences work to meet work requirements promptly and effectively - Identifies and solves client problems, and provides advice and options that enhance the service to clients - Uses a range of digitally based technologies and software packages, including spreadsheets, databases and the internet

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
FNSBNK405 Provide mobile banking sales and services	FNSBNK405A Provide mobile banking sales and 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 FNSBNK405 Provide mobile banking sales and services

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Performance Evidence

Evidence of the ability to:

- respond to client queries using clear and effective communication skills
- determine client requirements, assess suitability of products and services and advise on mobile banking needs
- strictly follow regulatory restrictions and organisational policy and procedures to provide sales and services to clients
- explain documentation thoroughly to clients and complete accurately, assisting clients where applicable
- respond to problems and provide follow-up service.

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:

- describe the key features of mobile banking products and services available to clients
- outline the key characteristics and conditions of similar products available in the industry
- describe the key features of organisational policy and procedures related to mobile banking services and products
- describe the key features of relevant financial documents relating to mobile banking products and services, including:
 - brochures
 - fact sheets
- compare and contrast the key features of selling techniques.
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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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