



Australian Government

Assessment Requirements for FNSBNK406 Manage customer visits

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.

Performance Evidence

Evidence of the ability to:

- use organisational tools to prepare for and schedule customer visits
- use effective communication skills to assess and determine customer requirements in accordance with organisational policy and procedures
- provide advice and information about suitable mobile banking products and services available to customers
- refer customers to appropriate specialist areas when cross-selling opportunities arise or are applicable
- use effective verbal and non-verbal communication skills to build rapport and respond to queries or concerns relating to the mobile banking service
- assist customers to complete relevant forms and complete documentation in accordance with organisational procedures.

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 organisational policy and guidelines related to mobile banking services and products
- outline the key characteristics and conditions of mobile banking products and services available in the industry
- explain the application of relevant legislation when promoting services, cross-selling and providing the customer with mobile banking services advice
- describe the key features of relevant financial document details, including:
 - brochures
 - fact sheets

- compare and contrast the key features of selling techniques
- analyse and discuss verbal and non-verbal communication signals and techniques, including negotiation skills and dispute resolution skills.

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 services information
- organisational policy and practices for providing services.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

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