



Australian Government

FNSBNK406 Manage customer visits

Release: 1

FNSBNK406 Manage customer visits

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 meet directly with customers seeking or using mobile banking services and deal effectively with their needs.

It applies to individuals who use specialised product knowledge, selling techniques and strong communication and interpersonal skills to build rapport and 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. Prepare for customer visits	1.1 Contact customers who may require mobile banking services from referrals or analysis of customer records 1.2 Access and evaluate details of current customer banking business to assess their status in accordance with organisational policy and procedures 1.3 Schedule suitable time for customer visit and confirm meeting venue 1.4 Gather relevant product and service information in readiness for customer
2. Establish customer mobile banking needs and	2.1 Determine customer mobile banking needs using questioning and active listening

ELEMENT	PERFORMANCE CRITERIA
match with services	2.2 Consider suitable services that match customer needs and clearly explain features, characteristics and benefits 2.3 Use sales aids as required
3. Respond to customer queries and non-verbal signals	3.1 Use gestures, posture, body language, facial expressions and voice modulation to create supportive environment 3.2 Use open-ended questions to identify customer preferences and respond using persuasive communication techniques to maintain interest 3.3 Identify and address any customer resistance or objection to products and services offered by using appropriate strategies
4. Formalise customer service requirements	4.1 Confirm agreement to mobile banking services 4.2 Negotiate and settle conditions of mobile banking services 4.3 Complete and process necessary documentation in accordance with organisational policy and procedures 4.4 Identify opportunities for cross-selling other products or services 4.5 Advise customer of follow-up services to be provided and thank politely when meeting is closed

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, 1.4, 4.3	Interprets textual information from a range of sources to determine critical features and required action
Writing	1.1, 1.3, 4.1, 4.2, 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, 1.3, 2.1, 2.2, 3.1-3.3, 4.1, 4.2, 4.5	Participates in verbal exchanges of information using language, tone and pace to create a supportive environment appropriate for the audience and purpose

		• Uses active listening and questioning to clearly convey information, elicit and respond to feedback and confirm understanding
Numeracy	1.2	• Uses mathematical equations to perform calculations and check for accuracy in financial and numerical information
Navigate the world of work	1.2, 4.3	• Recognises and follows business rules and protocols, and meets expectations associated with own role
Interact with others	1.1	• Initiates contact with others and uses advanced communication skills to establish then sustain the relationship • Adapts personal communication style to show respect for the values, beliefs and cultural expectations of others
Get the work done	1.1-1.4, 2.1-2.3, 3.1-3.3, 4.1-4.5	• Sequences and schedules complex activities, monitors implementation and manages relevant communication • Makes decisions and submits recommendations based on an analysis of documents and verbal information • Develops options, resolves issues and negotiates solutions to problems • 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
FNSBNK406 Manage customer visits	FNSBNK406A Manage customer visits	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 FNSBNK406 Manage customer visits

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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

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<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe>