



Australian Government

FNSBNK414 Promote mobile banking services

Release: 1

FNSBNK414 Promote mobile banking services

Modification History

Release	Comments
Release 1	This version first released with FNS Financial Services Training Package Version 4.0.

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 from referrals or analysis of customer records 1.2 Evaluate customer status and sustainability for a loan, according to organisational policies and procedures 1.3 Gather applicable products and service information in readiness for customer 1.4 Determine applicable communication techniques for informing clients about mobile banking services 1.5 Develop contact procedures for clients
2. Develop and implement promotional tools	2.1 Identify appropriate mobile banking service model 2.2 Analyse applicable promotional concepts for mobile banking specific to individual clients

ELEMENT	PERFORMANCE CRITERIA
	2.3 Identify and develop suitable promotional tools and techniques for mobile banking services 2.4 Produce documentation to assist in promotional activities according to organisational policies and procedures
3. Finalise promotional tools and techniques with sales team	3.1 Provide team members with information on promoting mobile banking services 3.2 Address queries on techniques and tools with sales team, and inform of procedure to escalate complex queries from clients according to organisational policies and procedures 3.3 Finalise documents for agreements on providing mobile banking services to clients in line with applicable standards as set out in quality control documentation 3.4 Advise team members of follow-up services to be provided to clients, if required

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

Skill	Description
Reading	Accesses and analyses key features of information from a range of sources to address specific criteria and determine requirements
Writing	- 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
Oral communication	- Participates in verbal exchanges of information using language, tone and pace specific to the audience and purpose - Uses active listening and questioning to convey information, elicit feedback and confirm understanding with a range of stakeholders
Numeracy	Performs mathematical calculations to check data accuracy and consolidate financial information
Self-management	- Incorporates organisational policies, procedures and standards in all activities and documentation - Sequences and schedules complex activities, monitors implementation and manages relevant communication - Implements standard procedures for routine decision making
Initiative and	Develops ideas and products following analysis of complex information and data

Skill	Description
enterprise	Analyses and consolidates client information to produce solutions that address client needs
Technology	Uses a range of digitally based technologies and software packages, including spreadsheets, databases and the internet

Unit Mapping Information

Supersedes and is equivalent to FNSBNK404 Promote mobile banking services.

Links

Companion Volume Implementation Guide is found on VETNet -

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

Assessment Requirements for FNSBNK414 Promote mobile banking services

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Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- promote mobile banking services to at least two clients.

In the course of the above, the candidate must:

- 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 policies and procedures when developing promotional tools, techniques and documentation
- follow organisational policies, 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.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- key client motivations, needs and wants relating to mobile banking
- organisational policies and procedures related to mobile banking services and products
- methods of customer status and sustainability evaluation for loans
- key characteristics and conditions of similar mobile lending services available in the industry
- key requirements of financial services legislation required to produce the performance evidence
- key characteristics of promotional tools and selling techniques required to produce the performance evidence

- key communication techniques required to produce the performance evidence
- financial documents relating to mobile banking products and services, including:
 - brochures
 - fact sheets
- types of standard promotional concepts.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- office equipment, technology, software and consumables
- organisational policies and procedures for providing services
- mobile banking service information.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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