



Australian Government

FNSCUS301 Respond to customer enquiries

Release: 1

FNSCUS301 Respond to customer enquiries

Modification History

Release	Comments
Release 1	This version first released with FNS Financial Services Training Package Version 1.0.

Application

This unit covers the skills and knowledge required to determine, confirm and provide a comprehensive answer to customer enquiries about financial products or services.

It applies to individuals who effectively communicate specialised information within a primary customer contact role in a financial service environment.

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

Unit Sector

Customer service

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. Obtain details of customer and nature of enquiry	1.1 Clarify nature of enquiry and obtain all details 1.2 Identify and confirm whether enquiry is within scope of responsibility or authority area 1.3 Decide whether enquiry can be satisfied immediately or further investigation is needed, and inform customer 1.4 Provide a response in accordance with organisational procedures if enquiry can be answered directly 1.5 Provide explanation to customer if further investigation required and agree on timeframe for follow up 1.6 Obtain customer details
2. Research information	2.1 Identify sources of information so that appropriate response

ELEMENT	PERFORMANCE CRITERIA
relevant to enquiry	can be provided within authority levels 2.2 Obtain, organise and analyse information to provide an accurate and satisfactory response
3. Determine suitable response to enquiry	3.1 Prepare response in line with organisational procedures, guidelines and authorities, and within accepted timeframe 3.2 Provide a comprehensive, clear response, delivered in most appropriate form and within agreed timeframe
4. Communicate information to customer	4.1 Provide written or oral responses in clear, simple and easy to understand language 4.2 Treat customers courteously and encourage an ongoing relationship 4.3 Consider and take into account customers' special needs 4.4 Attend promptly to any further queries from customers 4.5 Undertake checks and/or follow up to ensure that response satisfies customer needs
5. Update relevant records	5.1 Collect information on nature and frequency of enquiries for evaluation 5.2 Record details of enquiry as required by organisational procedures

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, 1.4, 2.1, 2.2, 3.1, 4.4, 4.5, 5.1, 5.2	Interprets and analyses information from a range of texts including customer communication, organisational documentation and legislation
Writing	1.2, 1.4, 1.5, 1.6, 2.2, 3.1, 3.2, 4.1, 4.5, 5.1, 5.2	Prepares documentation and correspondence according to organisational formats using clear language and correct grammar, spelling and terminology
Oral Communication	1.1-1.6, 3.2, 4.1, 4.5	- Speaks clearly using tone and pace appropriate for the audience and purpose - Uses questioning and active listening skills to check

		understanding
Numeracy	1.5, 2.1, 2.2, 5.1	Interprets and comprehends a range of mathematical information that is embedded in familiar and routine texts
Navigate the world of work	1.2, 1.4, 2.1, 3.1, 5.2	- Understands roles and responsibilities of own role and makes basic decisions on work completion parameters - Follows organisational policy, procedures and protocols, and legislative requirements relevant to own role
Interact with others	1.1-1.6, 3.2, 4.1-4.5	Follows accepted communication practices and protocols, adjusting personal communication style in response to the values, beliefs and cultural expectations of others
Get the work done	1.1-1.6, 2.1, 2.2, 3.1, 3.2, 4.4, 4.5, 5.1, 5.2	- Plans and implements routine tasks and workload, making limited decisions on sequencing and timing - Responds to predictable routine customer service problems and implements standard or logical solutions - Uses the main features and functions of digital tools to complete work tasks and access information

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
FNSCUS301 Respond to customer enquiries	FNSCUS301A Respond to customer enquiries	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 FNSCUS301 Respond to customer enquiries

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Performance Evidence

Evidence of the ability to:

- treat customers courteously and respond effectively to a range of enquiries that satisfy customer needs and achieve company outcomes
- maintain up-to-date knowledge or access accurate information to respond to customer enquiries
- adhere to customer service processes and procedures
- consider and respond appropriately to customers with special needs following organisational procedures
- collect, record and update data and information as required following 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 company policy, procedures and requirements relevant to responding to customer enquiries
- discuss the application of privacy and confidentiality requirements covered in organisational procedures and relevant legislation
- identify and describe sources of information to access in response to customer enquiries
- discuss the application of key requirements of relevant legislation and industry codes of practice
- describe different customer groups and types of information typically sought

Assessment Conditions

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

- common office equipment, technology, software and consumables
- organisational records, policy and procedures.

Assessors must satisfy NVR/AQTF assessor requirements.

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