



Australian Government

FNSCUS311 Respond to customer enquiries

Release: 1

FNSCUS311 Respond to customer enquiries

Modification History

Release	Comments
Release 1	This version first released with FNS Financial Services Training Package Version 6.0.

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 type of enquiry and details of customer	1.1 Identify characteristics of enquiry and document all customer details 1.2 Determine whether enquiry is within scope of individual's responsibility or to be escalated to senior authority 1.3 Identify whether customer is dissatisfied and follow the procedures set by the organisation to address dissatisfaction if required 1.4 Provide a response to customer according to organisational procedures and protocols 1.5 Determine next steps and inform customer of details and expected timeframes
2. Arrange response to enquiry	2.1 Identify sources of information required to produce a response 2.2 Organise information to provide response in line with

ELEMENT	PERFORMANCE CRITERIA
	organisational procedures, guidelines and authorities
3. Communicate information to customer	3.1 Provide a comprehensive and clear response to customer 3.2 Confirm that the response satisfies customer needs 3.3 Determine if there are further queries from the customer and address according to organisational procedures and protocols
4. Update required records	4.1 Collect information on nature and frequency of enquiries for evaluation as set out in organisational procedures and protocols 4.2 Record details of enquiry as required by organisational procedures

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	Interprets and analyses information from a range of texts including customer communication, organisational documentation and legislation
Writing	Prepares documentation and correspondence according to organisational formats using clear language, grammar, spelling and terminology
Oral Communication	- Speaks clearly using tone and pace intended for the audience and purpose - Uses questioning and active listening skills to check understanding - Follows accepted communication practices and protocols, adjusting personal communication style in response to the values, beliefs and cultural expectations of others - Communicates to customers courteously and encourages an ongoing relationship
Numeracy	Interprets and comprehends a range of mathematical information that is embedded in familiar and routine texts
Self-management	- Understands roles and responsibilities of own role and makes basic decisions on work completion parameters - Follows organisational policy, procedures and protocols, and legislative requirements required to perform own role - Plans and implements routine tasks and workload, making limited decisions on sequencing and timing

Skill	Description
Initiative and enterprise	• Responds to predictable and routine customer service problems and implements solutions • Applies conflict-resolution skills when responding to customer complaints and dissatisfaction
Technology	• Uses the main features and functions of digital tools to complete work tasks and access information

Unit Mapping Information

Supersedes and is equivalent to FNSCUS301 Respond to customer enquiries.

Links

Companion Volume Implementation Guide is found on VETNet -

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

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Assessment Requirements for FNSCUS311 Respond to customer enquiries

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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:

- respond with specialised information to at least four different enquiries received in a primary customer contact role, at least one of which must relate to a financial product and one to financial service.

In the course of the above, the candidate must:

- identify customer needs
- apply the required level of conflict resolution skills.

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 customer groups and types of specialised information typically sought
- organisational policy, procedures and requirements in responding to customer enquiries
- sources of information to access to provide an informed response to customer enquiries
- communication and interpersonal skills, including conflict resolution skills to respond to customer needs
- systems that can be assessed to obtain up-to-date information on nature and frequency of enquiries
- legislation and industry codes of practice required to produce knowledge evidence and performance evidence
- privacy and confidentiality requirements of organisational procedures and applicable legislation
- levels of authority and escalation methods within organisation
- limits of own individual level of authority.

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 records, policy and procedures.

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

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