



Australian Government

FNSCUS403 Deliver a professional service to customers

Release: 1

FNSCUS403 Deliver a professional service to customers

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 needed for understanding, clarifying and meeting customers' needs and expectations and those functions associated with the provision of a quality and professional service to customers.

It applies to individuals providing day-to-day customer service in a financial services 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. Project positive organisational image	1.1 Communicate with customers in a courteous and helpful manner appropriate to relationship and purpose of interaction 1.2 Follow organisation's standards and philosophy regarding presentation at all times
2. Identify customer needs and expectations	2.1 Clarify customers' needs and expectations 2.2 Identify and consider special requirements of customers when providing service
3. Provide customer service	3.1 Provide information based on knowledge of products and/or services to satisfy customer needs 3.2 Source information if not immediately available and/or refer

ELEMENT	PERFORMANCE CRITERIA
	customers to appropriate personnel 3.3 Seek confirmation from customers that needs and, where practical, expectations have been met 3.4 Record customer service feedback and provide to appropriate personnel to assist in evaluating if customer service needs have been met
4. Maintain customer confidentiality	4.1 Discuss customer related business only in context of workplace 4.2 Refrain from releasing customer information except as indicated in organisational policy, procedures and relevant legislation

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, 2.1, 2.2, 3.1, 3.2, 3.3, 4.2	- Synthesises information from multiple sources and integrates prior knowledge with new information - Comprehends relevant legislation, regulation, codes of practice and organisational procedures
Writing	1.1, 2.1, 3.1, 3.3, 3.4	Provides advice and information clearly, succinctly and accurately and in a form that is appropriate to audience, cultural differences, context and purpose
Oral Communication	1.1, 1.2, 2.1, 2.2, 3.1, 3.2, 3.3, 4.1	- Clearly explains detailed information using language, tone and pace appropriate to audience - Uses strategies such as questioning, active listening and reading of non-verbal cues to support effective communication
Numeracy	3.1, 3.2	Comprehends and interprets numerical information embedded in financial organisation texts, products and/or services
Navigate the world of work	1.2, 4.1, 4.2	Follows legislative requirements, and explicit and implicit organisational protocols, policy and procedures relevant to own role
Interact with others	1.1, 1.2, 2.1, 2.2, 3.1, 3.2, 3.3, 3.4, 4.1	Selects and uses appropriate communication practices and protocols, adjusting personal communication style in response to the values, beliefs and cultural

		expectations of others • Collaborates and cooperates with others to provide a professional service to customers
Get the work done	2.1, 2.2, 3.1, 3.2, 3.3, 3.4	• Applies problem-solving processes to address customer service issues • Accesses and uses digital systems and tools to record and store relevant information

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
FNSCUS403 Deliver a professional service to customers	FNSCUS403A Deliver a professional service to customers	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 FNSCUS403 Deliver a professional service to customers

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Performance Evidence

Evidence of the ability to:

- communicate effectively with customers to determine and satisfy their needs, giving consideration to any special requirements
- apply knowledge of products and services using a range of communication skills to interact with customers and provide good service
- follow organisational policy and procedures, and relevant legislative requirements relating to privacy and confidentiality

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 purpose and application of customer service principles and practice
- identify and interpret the key requirements of relevant legislation covering consumer rights and service, privacy and the delivery of financial services
- describe the organisation's key products and services
- describe key features of organisational policy, procedures and protocols that impact on delivering a professional service to customers
- discuss the scope of capacity to offer advice on financial products and services, and their benefits and applications within the requirements of relevant legislation

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 and industry software packages

- organisational records
- organisational policy and procedures.

Assessors must satisfy NVR/AQTF assessor requirements

Links

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