



Australian Government

Assessment Requirements for FNSIBK507 Review service performance

Release: 1

Assessment Requirements for FNSIBK507 Review service performance

Modification History

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

Performance Evidence

Evidence of the ability to:

- apply high level analysis, decision making and auditing to ensure service performance is in line with desired outcomes
- conduct timely performance reviews and spot checks against service performance indicators
- analyse service results, and report and recommend appropriate actions
- implement procedures and determine effectiveness.

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:

- provide examples of approaches used for continuous improvement in client service
- outline the key performance indicators and key result areas for client servicing
- explain the application of marketing principles and practice in developing strategies for client servicing
- outline forecasting related to the client servicing aspects of the organisational budget
- outline the impact of underwriting guidelines and authorities on organisational policy and procedures related to client servicing
- explain responsibility taken for compliance requirements by brokers undertaking client servicing.

Assessment Conditions

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

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

Assessors must satisfy NVR/AQTF assessor requirement.

Links

Companion Volume implementation guides are found in VETNet -

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