



Australian Government

FNSPIM409 Maintain customer relationship

Release: 1

FNSPIM409 Maintain customer relationship

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 required to maintain an ongoing relationship with customers and retain the business within the personal injury management sector. It encompasses applying a range of organisational and interpersonal skills in one-to-one interactions or for supporting organisational procedures and strategies for retaining and enhancing the customer relationship.

It applies to individuals who use specialised knowledge and strong communication skills and techniques to network, build business and implement organisational strategies.

Work functions in the occupational areas where this unit may be used are subject to regulatory requirements. Refer to the FNS Implementation Guide Companion Volume or the relevant regulator for specific guidance on requirements.

Unit Sector

Personal injury management

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. Maintain records of customer interaction	1.1 Collect and check customer information with existing records 1.2 Keep records of customer interaction up to date 1.3 Maintain records of customer interaction in accordance with organisational procedures and relevant legislation
2. Provide ongoing customer service	2.1 Review previous interactions with customers 2.2 Take steps to determine customer satisfaction with service provided

ELEMENT	PERFORMANCE CRITERIA
	2.3 Resolve problems or refer to relevant personnel as required 2.4 Record areas where problems occur and provide information to management
3. Maintain regular communication with customers	3.1 Determine customer needs based on records and claim information 3.2 Establish effective regular communication with customers 3.3 Ensure level of communication is appropriate to customer requirements

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, 1.3, 2.1, 2.2, 3.1	Interprets and analyses information from a range of sources and consolidates information relevant to requirements
Writing	1.2, 1.3, 2.2, 2.3, 2.4, 3.2	Develops a range of formal and informal material incorporating specific information and using a style and language appropriate to the audience and purpose
Oral Communication	2.2, 2.3, 2.4, 3.2	- Clearly and effectively presents detailed information using language, concepts, terminology, tone and pace appropriate to the audience and purpose - Participates in verbal exchanges using active listening and questioning, and uses collaborative techniques to convey and clarify information and elicit feedback
Numeracy	1.1	Interprets, compares and accurately records numerical information to meet requirements
Navigate the world of work	1.3	Recognises and responds to relevant legislative requirements, policies and procedures and meets expectations associated with own role
Interact with others	2.3, 3.1-3.3	Implements strategies aimed at building rapport and fostering strong relationships for a diverse range of clients
Get the work done	1.1, 1.2, 2.1-2.4, 3.1-3.2	- Plans and sequences work tasks to meet outcomes and client requirements - Responds to predictable routine problems seeking

		advice where appropriate • Uses the main features and functions of digital tools to complete work tasks
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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
FNSPIM409 Maintain customer relationship	FNSPIM409A Maintain customer relationship	Updated to meet Standards for Training Packages. Element 4 deleted - not appropriate for sector.	No 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 FNSPIM409 Maintain customer relationship

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Performance Evidence

Evidence of the ability to:

- use specialist knowledge and skills, and a range of interpersonal skills, to enhance customer relationships
- maintain records and documentation relating to customer relationships
- consider and adapt to any special needs and diversity of customers, including cultural, language, race, religion, ethnic origin, socioeconomic status and demographic needs.

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 a range of techniques used to develop customer relationships
- describe key features of:
 - industry and organisation codes of practice, policy and operating procedures
 - current organisation's services
 - databases and computer systems
 - relevant legislation.

Assessment Conditions

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

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

Assessors must satisfy NVR/AQTF assessor requirements.

Links

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