



Australian Government

FNSPIM419 Maintain relationships with personal injury clients

Release: 1

FNSPIM419 Maintain relationships with personal injury clients

Modification History

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

Application

This unit describes the skills and knowledge required to maintain ongoing relationships with and retain the business of clients within the personal injury management sector. It involves using organisational and interpersonal skills in one-to-one interactions to retain and enhance the client relationship.

The unit applies to those who use personal injury sector specific knowledge and 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. Users are advised to check with the relevant state and territory regulatory authorities to confirm those 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. Establish client interaction requirements	1.1 Determine client needs and establish follow up required based on claim information and existing case management records 1.2 Establish communication methods and frequency with client 1.3 Confirm level of communication is appropriate to client requirements and adheres to organisational policies and procedures 1.4 Conduct initial client interaction
2. Provide client service	2.1 Review previous interactions with client based on case management records and claim information, and determine client

ELEMENT	PERFORMANCE CRITERIA
	requirements for follow up 2.2 Contact client based on preferred method and frequency as noted in previous case management records 2.3 Seek feedback from client to determine satisfaction levels with service provided 2.4 Resolve problems within scope of own role and escalate as required
3. Maintain records of client interaction	3.1 Confirm client information is current and update as required 3.2 Document client interactions according to organisational policies and procedures, and legislative and regulatory requirements

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
Numeracy	Interprets, compares and records numerical information to meet requirements
Oral communication	- 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
Reading	Interprets and analyses information from a range of sources and consolidates information relating to requirements
Writing	Develops a range of formal and informal material incorporating specific information and using a style and language appropriate to the audience and purpose
Planning and organising	- Plans and sequences work tasks to meet outcomes and client requirements - Identifies and responds to legislative and regulatory requirements, policies and procedures and meets expectations associated with own role
Problem solving	- Implements strategies aimed at building rapport and fostering strong relationships for a diverse range of clients - Responds to predictable routine problems seeking advice where appropriate

SKILL	DESCRIPTION
Technology	• Uses the main features and functions of digital tools to complete work tasks

Unit Mapping Information

Supersedes and is equivalent to FNSPIM409 Maintain customer relationship.

Links

Companion Volume Implementation Guide is found on VETNet -

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

Assessment Requirements for FNSPIM419 Maintain relationships with personal injury clients

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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:

- maintain relationships with at least three different personal injury clients.

In the course of the above, the candidate must:

- maintain records according to organisational policies and procedures, and legislative and regulatory requirements
- confirm and adapt to any special needs and diversity of clients, including cultural, language, race, religion, ethnic origin, socioeconomic status and demographic needs.

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 features of organisational policies and procedures, industry codes of practice and legislative and regulatory requirements relating to personal injury case management, including:
 - databases and information technology systems
 - information to be recorded
 - chain of command when escalating issues
 - recording and maintaining client information
- case management services offered by organisation
- techniques related to:
 - communication methods and styles
 - client relationship development and management
 - feedback gathering
 - client service and case management
 - de-escalation and resolution of issues.

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:

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

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

Links

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