



Australian Government

Assessment Requirements for FNSRTS301 Provide customer service in a retail agency

Release: 1

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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:

- maintain and apply relevant and up-to-date knowledge of the products and services of the retail agency
- provide accurate information and assistance to customers with documentation
- review forms and documentation for accuracy
- process transactions accurately
- routinely conduct reconciliation of monies with transaction records
- apply effective customer service skills in dealing with customers of the retail agency
- identify and respond to customer queries and complaints within appropriate scope of authority and in accordance with appropriate legislative requirements
- provide information to customers regarding the complaints process and assist customers in a courteous and timely manner.

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 role, services and products provided by the agency on behalf of the financial services institution
- describe the key features of:
 - customer service principles and practice
 - organisational policy, procedures and protocols, including complaints
- outline the key steps and reasons for verifying customer identity and security checking procedures

- describe the key requirements of legislation and industry regulation that impact on the scope of advice that can be provided on financial products and services and their benefits and applications.

Assessment Conditions

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

- common office equipment, technology, software and consumables
- relevant agency transaction systems and data.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -

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