



Australian Government

Assessment Requirements for FNSRTS311 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 4.0.

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:

- provide customer service in a retail agency context on at least four different occasions and relating to at least two different kinds of products or services.

In the course of the above, the candidate must:

- identify customer needs
- apply the required level of conflict resolution skills.

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:

- services and products provided by the agency on behalf of the financial services institution
- the agencies role acting on behalf of the financial service institution
- customer service principles and practice
- organisational policy, procedures and protocols required to produce the performance criteria and performance evidence
- key requirements of legislation and regulation that impact the scope of advice that can be provided on financial products and services
- key steps and reasons for verifying customer identity and security checking procedures
- the agencies limits of authorisation
- individual level of authority limits
- organisations established security checking procedures.

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:

- office equipment, technology, software and consumables
- agency transaction systems and data
- legislation and regulation required to produce the performance evidence and knowledge evidence.

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

Links

Companion Volume Implementation Guide is found on VETNet -

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