



Australian Government

FNSRTS311 Provide customer service in a retail agency

Release: 1

FNSRTS311 Provide customer service in a retail agency

Modification History

Release	Comments
Release 1	This version first released with FNS Financial Services Training Package Version 4.0.

Application

This unit describes the skills and knowledge required to apply customer service skills and process financial services transactions in non-financial services organisations that act as an agency.

It applies to individuals who, within their level of responsibility, use clear communication skills to provide up-to-date and accurate information and follow procedures to process transactions.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Financial retail services

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. Represent financial services institution	1.1 Confirm role and purpose of agency in providing services on behalf of financial services institution 1.2 Obtain required documentation about products and services of financial services institution 1.3 Develop and maintain knowledge of required products and services
2. Identify and address customers' needs	2.1 Identify whether customer is dissatisfied and follow the procedures set by the organisation to address dissatisfaction if required 2.2 Respond to customer requests within limits of agency authorisation

ELEMENT	PERFORMANCE CRITERIA
	2.3 Refer requests that require information, advice, products and services that fall outside agency level of authorisation and knowledge to applicable financial services institution 2.4 Assist customers to complete documents and transaction forms
3. Process customer transactions	3.1 Verify customer identity using established security checking procedures 3.2 Check information provided by customers for accuracy and completeness 3.3 Refer customer queries or complaints that are outside agency's level of authorisation or knowledge to financial services institution for resolution 3.4 Complete transactions following protocols and processes of financial services institution 3.5 Routinely conduct reconciliation of monies received with transaction records

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
Reading	Accesses information from a range of sources and interprets documents to confirm and determine requirements
Writing	Completes forms and transaction records, using correct spelling and grammar
Oral Communication	- Participates in verbal exchanges using active listening and questioning to determine requirements - Interacts in courteous manner when communicating with customers - Clearly explains and clarifies information using language, tone and pace intended to the audience and purpose
Numeracy	Uses mathematical equations to undertake basic financial transaction calculations
Self-management	- Understands the purpose of own role and associated responsibilities, and follows organisational procedures and protocols for customer service provision - Makes routine decisions and implements standard procedures for routine tasks and predictable problems, recognising when referral to higher authority is necessary

Skill	Description
	• Demonstrates resilience during and after challenging conversations and interactions with customers • Plans and sequences routine tasks and workload, seeking clarification from others as required
Technology	• Uses familiar digital technologies and systems to access information, search and enter data, and communicate with others

Unit Mapping Information

Supersedes and is equivalent to FNSRTS301 Provide customer service in a retail agency.

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 FNSRST311 Provide customer service in a retail agency

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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:

- 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

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