



Australian Government

FNSSAM301 Identify opportunities for cross-selling products and services

Release: 1

FNSSAM301 Identify opportunities for cross-selling products and services

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 identify cross-selling opportunities and sell the identified products or services to customers while providing other services.

It applies to individuals who, within their level of authority, apply specialised knowledge to make judgements and recommendations based on specific information.

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

Unit Sector

Sales and marketing

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. Identify opportunities for cross-selling of products and services	1.1 Use range of communication and interpersonal skills to respond to enquiry, identify customer needs and establish relationship with customer 1.2 Identify further opportunities for providing customer with additional products or services based on understanding of customer needs, and access further information about identified products and services if required
2. Promote sales of products and services	2.1 Explain benefits and features of additional products or services to customer clearly and accurately 2.2 Match organisation's products or services to assessed customer needs and offer number of options

ELEMENT	PERFORMANCE CRITERIA
	2.3 Check compliance with relevant legislation, regulations and industry codes of practice for all options developed
3. Refer sales or service to appropriate area	3.1 Prepare documentation for processing when decision has been reached on sale of product or service to be provided 3.2 Inform customer of reasons why referral to other personnel is required if this needs to occur

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, 1.2, 2.1, 2.2, 2.3	Analyses a range of textual information from a variety of sources to identify key details, make judgements and determine requirements
Writing	1.1, 1.2, 2.1, 3.1, 3.2	- Develops material to a specific audience using clear and detailed language to convey accurate information - Records outcomes of communications using specific language, grammar and punctuation to correctly and effectively convey recommendations
Oral Communication	1.1, 1.2, 2.1, 3.2	- Participates confidently in verbal exchanges and provides technically correct information using vocabulary, tone and pace appropriate to the audience and the situation - Uses active listening and questioning techniques to elicit the views and opinions of others and confirm understanding
Numeracy	1.2, 2.1	Uses a limited range of mathematical calculations to perform comparisons of financial information
Navigate the world of work	2.3	Applies knowledge of legal rights and responsibilities on own work context
Interact with others	1.1, 1.2, 2.1, 2.2, 3.2	- Identifies ways of establishing connections and building relationships with a diverse range of people - Follows accepted communication practices and protocols, adjusting personal communication style in response to the values, beliefs and cultural expectations of others

Get the work done	1.1, 1.2, 2.1, 2.2, 2.3, 3.1	• Takes responsibility for planning and sequencing tasks to achieve required outcomes • Systematically gathers and analyses all relevant information and evaluates options to address issues or make product or service recommendations • Uses digital systems and tools to connect with others and to access, filter, extract, organise and present information
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Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
FNSSAM301 Identify opportunities for cross-selling products and services	FNSSAM301A Identify opportunities for cross-selling products and services	Updated to meet Standards for Training Packages	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 FNSSAM301 Identify opportunities for cross-selling products and services

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Performance Evidence

Evidence of the ability to:

- interact with customers and identify cross-selling opportunities
- clearly explain additional products and services that may be beneficial to customers and provide options based on customer needs in line with relevant legislation, regulations and industry codes of practice
- refer customers to other appropriate sections of the organisation, as required
- complete relevant documentation following organisational procedures.

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:

- identify and describe customer relations building techniques
- outline the key features of financial products and services offered by or through an organisation
- explain the key features of finance industry and organisational policy and procedures
- explain the organisational process and procedures for cross-selling services and products
- describe the key features of a range of products including:
 - interest rates
 - terms
 - special packages
- explain the key requirements of relevant legislation and the potential and/or actual impact on information requested or provided
- compare and contrast selling techniques.

Assessment Conditions

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

- financial services product information
- a relevant software system and data
- organisational policy and procedures
- common office equipment, technology, software and consumables.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

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