



Australian Government

Assessment Requirements for FNSSAM611 Monitor performance of financial products and services in meeting client needs

Release: 1

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Modification History

Release	Comments
Release 1	This version first released with the FNS Financial Services Training Package Version 8.0. Supersedes and is equivalent to FNSSAM601 Monitor performance in sales of financial products and services.

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:

- monitor performance of at least two different financial products and two different services in meeting client needs.

In the course of above, the candidate must:

- provide clear feedback and advice on performance and quality client service to personnel and management.

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:

- client relations and service techniques to maintain client relationship and pinpoint their needs
- requirements of regulations and industry codes of practice relating to financial products and services
- key features of organisational policies and procedures in regard to providing products and services
- key features of:
 - product or account and service range
 - branch or department targets
- importance of performance of products and services in business performance and the factors that enhance promotional performance.

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:

- financial services product information
- organisational policies and procedures
- office equipment, technology, relevant software systems and data and consumables.

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>