

Accreditation : This Module is a Nationally Accredited Course

Title : **FNSICCUS301B – RESPOND TO CUSTOMER ENQUIRIES**

Field Of Study : **Imported Units**

What is this course all about?

This unit involves the skills and knowledge required to respond to customer enquiries about financial products or services.

When you have finished this course you should be able to demonstrate your ability to:

Obtain details of customer and nature of enquiry – FNSICCUS301B/01

- ❑ The nature of the enquiry is clarified and all details obtained
- ❑ A decision on whether the enquiry is within the scope of responsibility or authority area is confirmed
- ❑ A decision on whether the enquiry can be satisfied immediately or whether further investigation is needed is made and customer is informed
- ❑ If the enquiry can be answered directly, a response in accordance with organisational procedures is provided
- ❑ If further investigation is required, the reason is explained to the customer and a timeframe is agreed upon for follow-up
- ❑ Customer details are obtained

Research the information relevant to the enquiry – FNSICCUS301B/02

- ❑ Sources of information are identified so that an appropriate response can be provided within authority levels
- ❑ Information is obtained, organised and analysed to provide an accurate and satisfactory response

Determine a suitable response to the enquiry- FNSICCUS301B/03

- ❑ Response is prepared in line with organisational procedures, guidelines and authorities and within accepted timeframe
- ❑ Response is comprehensive, clear and delivered in the most appropriate form (oral, written) and within the agreed upon timeframe

Communicate information to the customer- FNSICCUS301B/04

- ❑ Written or oral responses are given in clear, simple, and easy to understand language
- ❑ Customer is treated courteously and an ongoing relationship is encouraged
- ❑ Any further queries from the customer are attended to promptly
- ❑ Checks and/or follow-up are undertaken to ensure that the response satisfies the customer's needs

Update relevant records- FNSICCUS301B/05

- ❑ Information on the nature and frequency of enquiries is collected for evaluation
- ❑ Details of the enquiry are recorded as required by organisational procedures

Some examples of individuals that will benefit from these courses are: -

- ❑ Managers
- ❑ Supervisors
- ❑ Team leaders
- ❑ Front line Staff

You will have better skills & knowledge and familiarise yourself more in the following areas -

- ❑ Interpersonal skills
- ❑ Listening skills
- ❑ letter writing skills
- ❑ analysis of data skills
- ❑ using telephone or computer technology, especially databases to record customer enquiries, information and response
- ❑ company policy, procedures and requirements
- ❑ financial strategies and solutions suitable for customer situations and profiles
- ❑ product/policy terms and conditions
- ❑ relevant legislation and industry
- ❑ dispute resolution process
- ❑ conflict resolution process
- ❑ customer service process
- ❑ privacy and confidentiality legislation and requirements

What Recognition will you achieve?

Where a demonstrated competency has been achieved in accordance with the endorsed Australian Quality Training Framework (AQTF) standards, a Statement of Results can be issued for those competencies successfully completed in this course. These can be combined with additional competencies achieved later, and together may build towards the issuing of qualification, at Certificate II plus.

How will you be assessed?

Demonstration of competencies for this qualification is achieved via formal assessment. Participants complete a work related project/activities, which incorporates the range of competencies covered for each unit. At completion of each module these activities will be handed in to your trainer, assessed then returned with relevant comments to keep you informed with your progress.

Will you be eligible for subject exceptions?

The units can be completed through attendance at MTG training courses. You may have already attained some competencies covered in the units through previous training, work, or life experience. If you feel you can already demonstrate a competency, then you should apply for **Recognition of Current Competencies (RCC)**. An RCC application form can be found in the MTG trainee welcome kit where you can fill out and fax back to us on (03) 9482-6988 or simply visit our website on www.matrixtraininggroup.com/downloads.php in order to download this application.

What training materials and training aids will you have?

1. **Learner Guides:** - Matrix Training Group will supply each trainee with a module for each unit which contains must know information, learning activities and projects, which will keep you enthusiastically involved in the course. Upon completion of each module these activities will be handed in to the trainer, assessed then returned to trainees with relevant comments to keep you informed with your progress.
2. **Online Support:** - Your Trainer is always available through E-mail & Website support. Our website address is www.matrixtraininggroup.com
3. **Telephone Support:** - You may call your trainer during business hours for over the telephone support.