

**Accreditation** : This Module is a Nationally Accredited Course

**Title** : **FNSICSAM301B – IDENTIFY OPPORTUNITIES FOR CROSS SELLING PRODUCTS AND SERVICES**

**Field Of Study** : **Finance**

### What is this course all about?

This unit encompasses the competencies required to identify cross selling opportunities and sell the identified products or services to customers.

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

#### Identify opportunities for cross selling of products and services– FNSICSAM301B/01

- ❑ A range of communication and interpersonal skills are used to identify customer needs and establish a relationship with the customer
- ❑ Information is provided to the customer in response to initial enquiry
- ❑ Based on understanding of customer needs, knowledge of the organisations products and services and marketing trends, further opportunities for providing the customers with additional products or services are identified
- ❑ Further information about the identified products and services is accessed, if required

#### Promote sales of products and services - FNSICSAM301B/02

- ❑ Benefits and features of products or services are explained to the customer
- ❑ Product knowledge is used to match products or services to the customers needs
- ❑ A number of options based on assessment of the customers needs are offered
- ❑ Compliance with relevant legislation, regulations and industry codes of practice of all options developed is checked

#### Refer sales/service to appropriate area- FNSICSAM301B/03

- ❑ When a decision has been reached on sales of the product or the service to be provided, documentation relating to the interaction is prepared for processing
- ❑ If referral to another section of the organisation is required, the customer is informed of the reasons why this needs to occur

### 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 -

- ❑ communication skills
- ❑ interpersonal/relationship building skills
- ❑ negotiation skills
- ❑ referral skills
- ❑ recording skills
- ❑ problem solving skills
- ❑ selling skills (including listening, questioning, matching needs, confirming sale)
- ❑ product and service knowledge
- ❑ introductory knowledge of the finance industry, business communication and business law
- ❑ knowledge of customer relations
- ❑ customer service
- ❑ company's manner of dealing with complaints
- ❑ knowledge of relevant legislation and potential/actual impact on information requested or provided
- ❑ sales techniques
- ❑ knowledge of organisation's policies and procedures in regard to customer service and sales

### What Recognition will you achieve?

Where demonstrated competencies 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](http://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](http://www.matrixtraininggroup.com)
3. **Telephone Support:** - You may call your trainer during business hours for over the telephone support.