



Australian Government

**Assessment Requirements for FNSBNK401
Coordinate a small business customer
portfolio**

Release: 1

Assessment Requirements for FNSBNK401 Coordinate a small business customer portfolio

Modification History

Release	Comments
Release 1	This version first released with FNS Financial Services Training Package Version 1.0.

Performance Evidence

Evidence of the ability to:

- comply with organisational business rules, processes and procedures to deliver services to small business customers
- identify and provide tailored business banking solutions and/or referrals to specialists to meet the identified needs of small business
- efficiently coordinate a portfolio of specified small business customers to ensure customer satisfaction with products and services
- effectively use communication and problem-solving skills in managing relationships with small business customers
- efficiently use organisational systems and reports to identify, document and evaluate customer banking needs.

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:

- describe customer usage patterns and document potential service and product options
- analyse key characteristics of customer motivations, needs and wants
- compare and contrast financial products and services, and their benefits and applications for small business customers
- describe the key features of organisational systems, policy, procedures and business rules relevant to delivering services to small business customers
- discuss the key principles of customer relationship marketing
- outline the organisation's referral process and its relationship to customer satisfaction
- describe information that can be accessed from organisational systems to assist in identifying and addressing customer needs

- outline the key small business legislative and reporting requirements.

Assessment Conditions

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

- office equipment, technology, software and consumables
- organisational records, policy and procedures.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe>