FINRFSGF1
Provide information to customers in a financial services environment

Overview

This standard is mainly about enabling you to deal with a variety of requests from customers relating to financial services; for example, in a reception area (face to face), or by telephone or correspondence. Such requests might include information about a new product, or altering an existing product or making a claim. Your work must involve you directly in providing information to customers in a financial services environment.

FINRFSGF1

Provide information to customers in a financial services environment

Performance criteria

You must be able to:

P1 Will promptly acknowledge customers and you will treat them in a courteous manner

P2 Will accurately find out what the customer requires to meet his/her information needs about financial services products and/or services

P3 Will recognise any requests for information about financial services products and/or services which you are not authorised to deal with

P4 Will promptly and accurately pass any requests for information about financial services products and/or services which you are not authorised to deal with to the person authorised by your employer to deal with them

P5 Will provide information about financial services products and/or services to customers which is clear, accurate and relevant to their needs

P6 Will keep a record of the information about financial services products and/or services provided, as required by your employer

P7 Will clearly and accurately describe the details of financial services products and/or services

P8 Will make sure the financial products and/or services are sufficient to meet what you believe are the customer's needs

P9 Will only disclose confidential information to the people authorised to receive

P10 Comply with legal requirements, industry regulations, ethical standards, organisational policies and professional codes

Knowledge and understanding

You need to know and understand:

K1	Your organisation's customer service procedures (including dealing with complaints)
K2	Your organisation's policy and procedures regarding communicating with customers
K3	Sources for providing relevant financial services products and/or services information and advice within your job role
K4	The difference between providing information and giving advice within your job role
K5	The types of financial services products and/or services information you are able to provide within your job role
K6	How to access customer records
K7	The features, terms and conditions of the financial products and/or services you deal
K8	The limits of your own personal authority and the action required if a request for information about financial services products and/or services is beyond those limits
K9	Your organisation's requirements relating to the application of codes, laws and regulatory requirements, including ethical standards and health and safety, as they impact on your activities

FINRFSGF1

Provide information to customers in a financial services environment

Additional Information

Behaviours

1. You effectively identify the information needs of others
2. You present information about financial services products and/or services clearly and concisely
3. You encourage customers to ask questions and seek clarification
4. You use information and knowledge effectively, efficiently and in the customer’s best interests
5. You show understanding of others and deal with them in professional manner
6. You pay attention to details that are critical to your work

FINRFSGF1

Provide information to customers in a financial services environment

Developed by	Financial Skills Partnership
Version number	1
Date approved	September 2012
Indicative review date	September 2015
Validity	Current
Status	Original
Originating organisation	Financial Skills Partnership
Original URN	FSPRFSGF1
Relevant occupations	Finance
Suite	Bank Accounts
Key words	Information; customers; reception; telephone; correspondence; financial services; banking; building societies