



## Subject outline

### **CFS Client engagement in financial services**

# Subject outline

## SUBJECT OVERVIEW

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Effective client engagement skills provide the foundations for building relationships within financial services. This subject explores communication styles and biases and discusses issues that can create barriers in client and financial services professional relationships. Students will develop strategies for effective communication and building relationships, to overcome the biases and barriers.

Students will demonstrate knowledge of client engagement methods, satisfaction measurement and monitoring. They will explore effective work and organisational practices, and continuous improvement and professional development approaches.

This subject utilises engaging, fully interactive digital resources, including videos, audio, interactive modules and activities, and quizzes. Students will benefit from access to a dedicated online tutor forum staffed by industry experts where they are able to post questions and hold discussions about the course content.

This subject is also part of the General Advice Specialisation – Superannuation (GAS-Super) course. The GAS-Super course is designed for individuals seeking to work, or who are already working in the superannuation industry in customer-facing roles, especially general advice.

## LEARNING OUTCOMES

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On successful completion of this subject, students should be able to:

- Explain the importance of loyal customers and the factors affecting customer engagement in a financial services business
- Apply different communication styles to build positive customer relationships
- Discuss continuous improvement and professional development initiatives to enhance customer engagement
- Identify strategies for building positive long-term relationships with clients and customers.

## TOPICS

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Topic 1: The impacts of satisfied and engaged customers on business success

Topic 2: Common reasons behind misunderstandings and resolving disputes

Topic 3: Communicating effectively with clients and fostering professional relationships

Topic 4: Measuring and improving the customer experience and engagement

Topic 5: Organisational practices that drive a high level of customer engagement

Topic 6: Overcoming personal biases and gaining the client's trust

Topic 7: Elevating the customer experience through professional development and continuous improvement initiatives



## UNITS OF COMPETENCY

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There are no units of competency are awarded for this subject.

## SUBJECT ENTRY REQUIREMENTS

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There are no educational entry requirements for this subject.

Individuals are required to be 18 years and over to enrol in this subject.

Individuals who are in Australia on a student visa are unable to enrol in this subject. If you are in Australia on a visa and wish to enrol, you need to check that you are enrolling in accordance with the study conditions of your visa.

## SUBJECT DURATION

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Students have a total of:

- 12 weeks to complete the learning and assessment requirements for the CFS Client Engagement in Financial Services, from their initial activation date.
- An additional four (4) weeks resubmission time, which will be granted if all assessment tasks have been attempted and the student has been deemed 'not yet competent' in one or more tasks. This time can be used to resubmit a written and oral assignment or resit an exam or quiz. There is no fee for this extension.

Therefore, if a student completes the learning and assessment, and the resubmission time is granted, the duration will be 16 weeks.

Students working in the industry may be able to complete this subject requirements in a shorter timeframe or less hours per week.

Additional study-related fees apply to formal extensions and re-enrolments. Please refer to the Vocational Education Fees schedule: <[www.kaplanprofessional.edu.au/faqs/financial-services-fees](http://www.kaplanprofessional.edu.au/faqs/financial-services-fees)>.

Please also refer to our Vocational Education and Training (VET) Enrolment Terms and Conditions: <[www.kaplanprofessional.edu.au/terms-and-conditions](http://www.kaplanprofessional.edu.au/terms-and-conditions)> or our Student Handbook:

<[www.kaplanprofessional.edu.au/current-students/vocational-education-student-handbook](http://www.kaplanprofessional.edu.au/current-students/vocational-education-student-handbook)> for important information on:

- subject activation and completion timeframes
- extensions
- subject re-enrolment.



## DELIVERY MODE

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This subject is delivered online and does **not** include hard copy notes.

Kaplan's online learning portal, KapLearn, enables the provision of innovative, interactive learning resources and support. KapLearn can be accessed anywhere, at any time, using a computer or mobile device that has internet access.

KapLearn is the access point for interactive multimedia modules, downloadable PDF course materials, review quizzes and other engaging materials. KapLearn is also the access point for ongoing support. The 'Ask your tutor' forum provides continuous technical support from subject matter experts.

## ASSESSMENT TASKS

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The assessment tasks for this subject are listed below.

Topic	Assessment	Assessment Detail
Topics 1-3	Written Assignment 1	Short answer questions
Topics 4-5	Quiz 1	Open-book, unsupervised, open-book, 20-item, multiple choice quiz, four (4) attempts
Topics 6-7	Quiz 2	Open-book, unsupervised, open-book, 20-item, multiple choice quiz, four (4) attempts
Topics 1-7	Written Assignment 2	Scenario-based short answer questions

Students may attempt the quizzes and/or submit their written assignments at any time if they believe they are adequately prepared. Students will receive personal reminder emails as they approach their assessment deadlines.

Students must be deemed to be demonstrated in **all** assessment items, including demonstrating competency in **all** of the quiz questions, to complete their course.

Students who complete the subject will receive a Certificate of Completion.

## RECOGNITION OF PRIOR LEARNING

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There is no recognition of prior learning available for this subject.



## FEES

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An updated schedule of fees is available at the Kaplan Professional website:  
<[www.kaplanprofessional.edu.au/faqs/financial-services-fees](http://www.kaplanprofessional.edu.au/faqs/financial-services-fees)>.

## STUDENT POLICIES

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Students who enrol in a Kaplan subject are bound by our published policies, including the policy that sets out our rules for assessment. Students can review these policies before they enrol by going to the Kaplan website: <[www.kaplanprofessional.edu.au/vocational-education-student-policies-and-forms](http://www.kaplanprofessional.edu.au/vocational-education-student-policies-and-forms)>. The policies also assist students when their study program does not go as planned and they need extra support.