

LIBF41-15

Business fundamentals for life insurance

Workplace observation form — to be completed by the workplace observer

Background

As a component of Certificate IV in General Insurance, students should be able to apply appropriate business skills when working in an office environment.

This unit covers the following skills, which are regarded as essential in an office environment:

1. Work effectively in the financial services industry (FNSINC301)

Students need to be able to interpret and apply procedures to deal with situations as they occur in the workplace.

Instructions

Once students have successfully completed the online course component, they need to demonstrate that they have acquired the relevant skills. You need to observe them in the workplace as they carry out the specified tasks.

1. You should be a supervisor or manager with experience and/or knowledge in the skills/competencies/tasks being assessed.
2. If applicable, you will negotiate a suitable date, time and venue for the student to interact with a client while you observe. The client's permission should be requested before this observation takes place.
3. You will need to email, post or fax the completed and signed workplace observation to ANZIIF within six (6) weeks following the student's completion of the online component of this course.

Email: wpo@anziif.com

Post: Assessment Department, Level 18, 1 Nicholson Street, East Melbourne, Victoria 3002, Australia.

Fax: (+61 3) 9642 4166

The completed WPO will be processed within 2 weeks of being received and an outcome will be emailed to the sender. For further enquiries, please contact Customer Service on (+61 3) 9613 7280.

STUDENT	Name	
	Master ID	
	Unique student identifier (USI)	
	Organisation	

OBSERVER	Name	
	Job title	
	Email address	
	Questions for the workplace observer	<input type="checkbox"/> Do you understand the purpose of this assessment? <input type="checkbox"/> Are you willing to be contacted should further verification be required? <input type="checkbox"/> Are you a supervisor or manager with experience and/or knowledge in the skills/competencies/tasks being assessed?

Workplace observations

Please record the date of each observation and place a check mark indicate the student has successfully performed the listed task to the required standard. You must record *three* successful observations to satisfy the requirement that the student performs these tasks on a consistent basis.

Does the student perform the following tasks to the required standard on a consistent basis? Refer to Appendix A for performance criteria.	Successful observations		
	Observation 1 date	Observation 2 date	Observation 3 date
	/ /	/ /	/ /
FNSINC301 Work effectively in the financial services industry			
Work within industry guidelines, procedures and legislation			
Communicate in the workplace			
Work safely			
Use workplace technology			
Work in a team environment			

Employability skills

Please place a check mark to indicate the student has successfully acquired the following skills.

- | | |
|---|---|
| <input type="checkbox"/> Performs job tasks to industry standards | <input type="checkbox"/> Works well with others |
| <input type="checkbox"/> Manages job tasks effectively | <input type="checkbox"/> Adapts to new tasks |
| <input type="checkbox"/> Implements safe working practices | <input type="checkbox"/> Copes with unusual or non-routine situations |
| <input type="checkbox"/> Solves problems on-the-job | |

Terms of acceptance

I, the workplace observer for this workplace observation checklist, warrant the truthfulness of the information provided. I have conducted this observation/role play in accordance with ANZIIF's guidelines.

Signature _____ Full name _____ Date / /

- I understand that checking this box constitutes a legal signature confirming that I acknowledge and agree to the above Terms of Acceptance.

Appendix A: Observation performance criteria checklist

Ensure you consider the following performance criteria when undertaking your observation.

You do not need to submit this appendix as it is only a reference guide.

FNSINC301 Work effectively in the financial services industry

Work within industry guidelines, procedures and legislation

- Apply guidelines, procedures, legislation and codes of practice to financial services industry and determine effects on everyday work
- Recognise and follow workplace procedures and instructions for environmentally sustainable work practices, and suggest any potential improvements to appropriate personnel
- Carry out work tasks in accordance with specific organisational policy, guidelines and procedures
- Undertake work tasks to meet organisation's philosophy, values and objectives in relation to customer service, professional practice and ethical principles
- Seek assistance from appropriate personnel to clarify application of guidelines, procedures and legislation, where necessary

Communicate in the workplace

- Use effective listening and speaking skills in verbal communications
- Respond to instructions or enquiries promptly and in accordance with organisational requirements
- Ensure presentation of written information meets organisational standards of style, format and accuracy in line with financial services industry
- Use communication to develop and maintain positive relationships, mutual trust and confidence

Work safely

- Follow established safety procedures when conducting work
- Identify designated persons to report queries and concerns about safety in the workplace
- Take action to eliminate workplace hazards or reduce risk
- Follow organisational procedures when responding to emergency incidents

Use workplace technology

- Access relevant information management systems and databases according to organisational procedures
- Use proprietary or organisational software effectively to develop workplace documents, input and extract data, and make calculations

Work in a team environment

- Provide support to team members to ensure work group goals are met
- Contribute constructively to work group goals and tasks
- Share information relevant to work with group to ensure designated goals are met
- Share opportunities for improvement of group activity with work group members