

# Certificate for Customer Service in the Financial Services Sector

## SCQF LEVEL 6 MODERN APPRENTICESHIP



 15 Month Programme

This qualification is designed for those looking to gain a specific technical focus in one of the key areas within financial services or to broaden their skills and knowledge.

### Introduction to the course

This apprenticeship is designed to support entry level roles across the financial services sector, including in banks, building societies and insurance organisations. Learners will gain an understanding of the rules and regulations of the banking industry and how these apply to their day to day role. They will learn the importance of personal and professional planning and development, and how to identify and process customer complaints to achieve fair customer outcomes.

This apprenticeship is best suited to those in roles which will require the apprentice to deal with customers, both internal and external. Learners will develop the ability to apply technical knowledge and skills across a range of products and services and demonstrate a clear understanding of regulatory frameworks.

### Learner outcomes

On completion, learners will have the knowledge and skills to confidently provide effective customer service, offer informed advice to the customer, communicate professionally with colleagues and stakeholders. Apprentices will also be able to identify and process customer complaints to achieve fair customer outcomes as they comply with all relevant financial regulations and codes of conduct. This course also allows learners to gain key meta-skills as they understand how to work collaboratively, use and promote technology to meet customer

and business needs and reflect on current business practices and contribute to continuous improvement. Learners will also develop meta-skills through a process of regular reflection, coaching, feedback and personal development.

### Assessment

Assessment is through performance in the workplace and will be based on performance evidence, i.e. observation (in person, screen sharing) and work products generated by the candidate (word-processed documents, letters, spreadsheets, travel/accommodation bookings, receipts, e-mail correspondence, database reports, graphic elements, etc.). The specific evidence produced will depend on the choice of optional units.

### A good fit for

Candidates working within the financial services industry wishing to progress within the sector. This includes roles such as an insurance underwriting administrator, claims handling administrator, pension administrator, banking cashier, trainee claims official, trainee broker or sales representative, customer adviser, foreign currency adviser or debt collector.

### What's next?

Completion of the apprenticeship and Professional Development Award (PDA) will allow learners to progress in their career within the Financial Services sector at a higher/promoted levels and continue their development with an Leadership & Management SCQF 6 apprenticeship.

### Course overview



**Start Date**  
Flexible



**Level**  
SCQF Level 6



**Duration**  
15 months



**Delivery**  
Blended



**Assessment**  
Workplace assessment



**Qualification**  
Certificate for Customer Service in the Financial Services Sector at SCQF at level 6



**Entry Requirements**  
No prior qualifications or knowledge are required to undertake this qualification although learners should be in a role where they carry out relevant tasks.

# Certificate for Customer Service in the Financial Services Sector

## SCQF LEVEL 6 MODERN APPRENTICESHIP

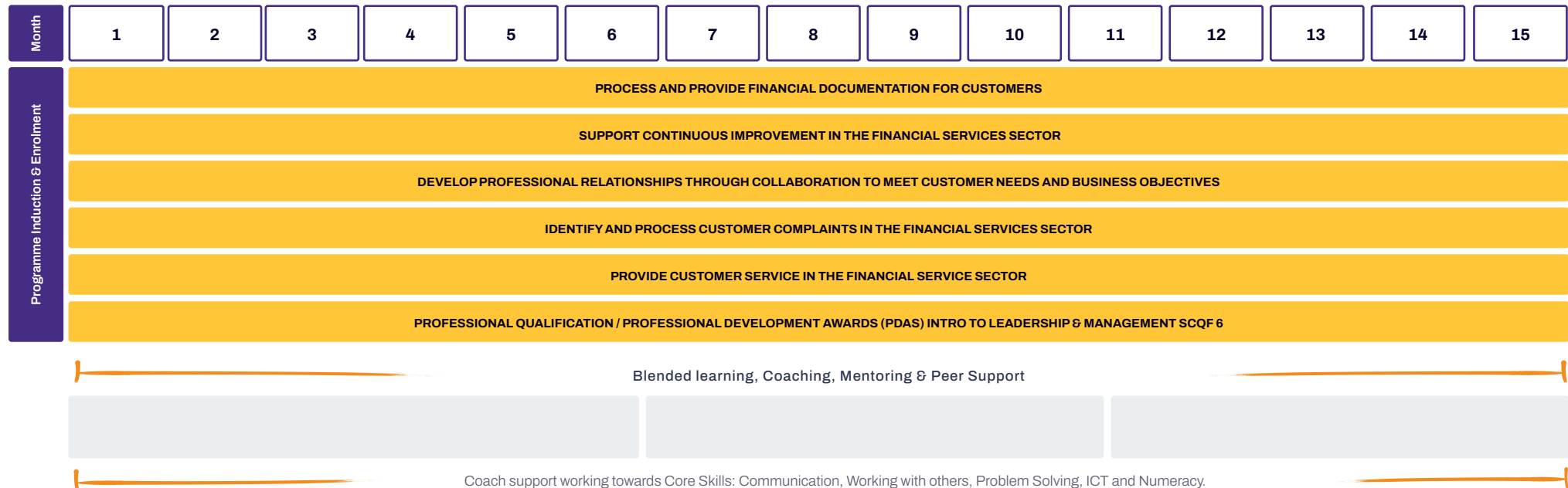


unlocking potential  
delivering personalisation  
enhancing performance

 15 Month Programme

This qualification is designed for those looking to gain a specific technical focus in one of the key areas within financial services or to broaden their skills and knowledge.

## Blended Delivery Model



### Key



Online learning



Progress reviews



Assessment visit

The optional units available will be discussed with your skills coach at the start of the programme, as part of your personal development plan.