

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

Learners will develop their knowledge on 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 set up and the importance of reviewing their development plan. The optional units will be chosen to suit the role of the apprentice and will support and stretch the learner building the knowledge and skills they need to succeed in their day to day role. The Scottish Apprenticeships system focuses on three key elements:

- The learning outcomes aligned to the specific functions of an apprentice's job;
- The knowledge, skills and behaviours that will be developed by apprentices, enabling them to work competently and confidently;
- The meta-skills that will be developed by apprentices to help them to manage themselves, collaborate with others and interact with change.

This apprenticeship is designed to support entry level roles across the financial services sector, including in banks, building societies and insurance organisations.

There are a number of entry level roles available, such as insurance underwriting administrator, claims handling administrator, pension administrator, banking cashier, banking call centre adviser, investment information administrator, trainee underwriter, trainee claims official, trainee broker or sales representative, customer adviser, foreign currency adviser or debt collector. All of these roles require employees to deal with customers (both internal and external), apply technical knowledge and skills across a range of products and services, and demonstrate a clear understanding of regulatory frameworks as well as the requirements of their own role and the goals of the organisation.

Learner outcomes

The apprenticeship will support the learner to develop their communication and IT skills within the workplace, aiding them to communicate effectively and professionally with stakeholders.

Apprentices will be expected to achieve the following learning outcomes by the end of their apprenticeship.

- Provide effective customer service
- Identify and process customer complaints to achieve fair customer outcomes

- Issue appropriate business documentation
- Comply with all relevant financial regulations and codes of conduct
- Use and promote technology to meet customer and business needs
- Build and maintain effective relationships with customers, colleagues and other stakeholders
- Reflect on current business practices and contribute to continuous improvement
- Work collaboratively in a team
- Develop meta-skills through a process of regular reflection, coaching, feedback and personal development
- Enhancements
- Professional Qualification
- Professional Development Awards (PDAs) intro to Leadership & Management SCQF 6

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.

What's next?

Completion of the apprenticeship will allow learners to progress in their career within the Financial Services sector at a higher/promoted level.

Skills
Development
Scotland

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Course overview



Start Date
Flexible



Level
SCQF Level 6



Duration
15 months



Delivery
Blended



Assessment
Workplace assessments



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

Certificate for Customer Service in the Financial Services Sector

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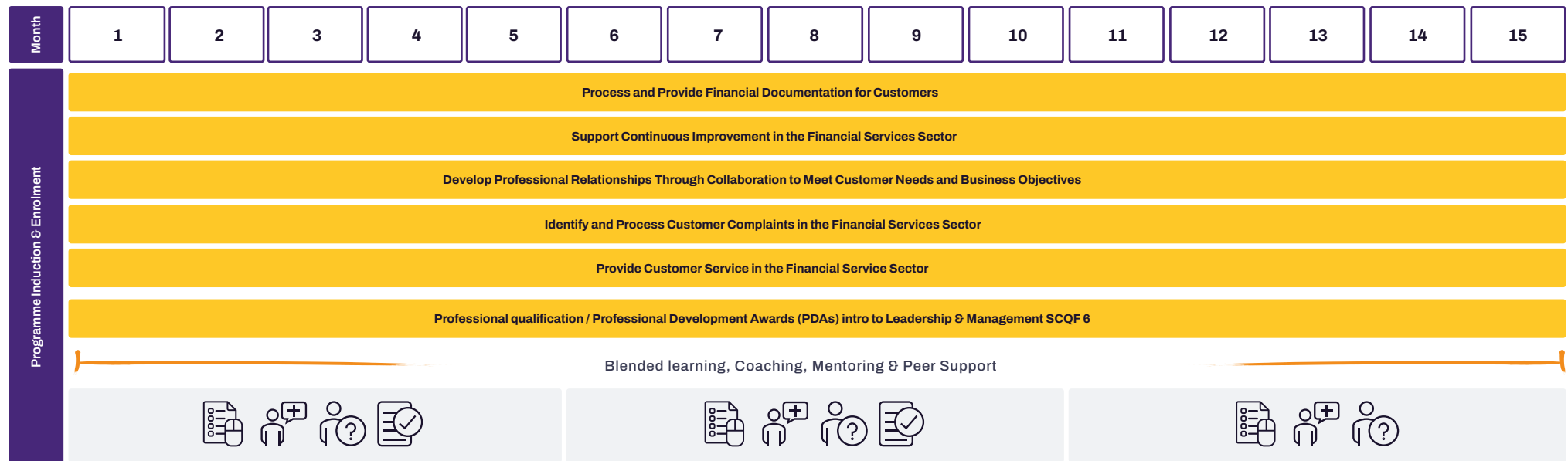


unlocking potential
delivering personalisation
enhancing performance

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Blended Delivery Model



Key



Online learning



Progress reviews



Assessment visit



Optional units

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