

Retail Financial Services (Banking) NVQ

This NVQ is for frontline service providers in a banking environment who deliver service to customers either by telephone or in person.

The qualification is based on recognised occupational standards and is jointly certificated by Best Practice and EDI – a leading Awarding Body for vocational qualifications.

- Course duration: 3 – 6 months
- Assessed through observation, discussion, workplace evidence and written worksheets
- Supported by e.learning and optional in-company workshops

To achieve the NVQ, candidates must complete *six* units in total; *three* mandatory units plus at least *two* technical units from group A, and any *one* additional unit from groups A-H.

Level 2

Mandatory: Core competencies
■ Develop yourself to improve and maintain workplace competence
■ Plan and organise your work in a financial services environment
■ Ensure your own compliance with financial services regulation
Group A – Bank Account options
■ Set up bank accounts for customers
■ Authorise financial transactions using telecommunications
■ Operate a sterling counter till
■ Operate a multi-currency till
Group G – Financial Services Customer Care
■ Provide customers with information about financial products and services
■ Deliver reliable customer service
■ Resolve customer service problems
■ Deal with customers by telephone
Group H – Financial Services Sales
■ Develop your personal sales networks
■ Generate and follow-up sales leads
■ Sell products and services over the telephone
■ Sell products or services face-to-face
■ Develop, implement and monitor sales call plans
■ Promote the organisation’s financial products and services

Highlights

- 60 – 90 minutes per week study & preparation time
- Assessed in the workplace by experienced assessors

Apprenticeships

To complete a government funded apprenticeship programme, candidates will also need to undertake an additional Technical Certificate and a short Key Skills project (exemptions may apply).