

Higher Apprenticeship Banking: Business and Commercial / Customer Relationship Management

Overview

This apprenticeship is suitable for those in commercial and/or CRM roles.

Group Requirements

Learners must achieve a minimum of 55 credits, with a minimum of 33 of these at Level 4. The units are set out in groups, and a summary of the units and their credit value that can be counted towards attaining the Apprenticeship are as follows:

- > Mandatory Units: 30 Credits
- > Financial Services: Branch Management and Commercial Customers: minimum of 10 credits
- > Leadership and Management and Working with Colleagues / Customer Service cross sector: minimum of 15 credits

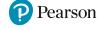
The following tables will outline the groups of units and the credit value available for selection:

Mandatory Units

| Title | Level | Credit |
|--|-------|--------|
| Managing your own performance, personal development and banking industry awareness | 4 | 5 |
| Maximising business opportunities within a financial services environment | 4 | 8 |
| Developing commercial relationships as a trusted advisor to financial services customers | 4 | 7 |
| Managing risk for financial service customers within your own area of responsibility | 4 | 10 |

Mae'r Rhaglenni Prentisiaeth, Hyfforddeiaeth a Thwf Swyddi Cymru, a arweinir gan Lywodraeth Cymru, yn cael cymorth ariannol gan Gronfa Gymdeithasol Ewrop

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Financial Services: Branch Management and Commercial Customers

| Title | Level | Credit |
|---|-------|--------|
| Leading and engaging your team in the monitoring and evaluation of business development within a financial services environment | 4 | 6 |
| Building professional networks in a financial services environment | 4 | 4 |
| Providing complex financial services solutions for commercial customers | 4 | 10 |
| Managing risk for financial services customers within your own area of responsibility | 4 | 10 |
| Researching and developing new commercial customers within a financial services environment | 4 | 7 |
| Working with customers to assess and enhance the quality of service provided within a financial services environment | 4 | 4 |
| Monitoring the quality of lending within your own area of responsibility | 4 | 7 |
| Reviewing and responding to the clients' changing financial needs and circumstances for financial advice and/or planning | 4 | 4 |

Leadership and Management and Working with Colleagues / Customer Service cross sector

| Title | Level | Credit |
|---|-------|--------|
| Develop and evaluate operational plans for own area of responsibility | | |
| Encourage new ideas and innovation amongst the work team | | |
| Implement change in own area of responsibility | | |
| Develop working relationships with colleagues and stakeholders | | |
| Recruit staff in own area of responsibility | | |
| Plan, allocate and monitor work in own area of responsibility | | |
| Address performance problems affecting team members | | |
| Manage conflict in a team | | |
| Lead and manage meetings | | |
| Support individuals to develop and take responsibility for their performance | | |
| Manage a budget for own area or activity of work | | |
| Manage knowledge in own area of responsibility | | |
| Develop a customer focused organisation | | |
| Manage the achievement of customer satisfaction | | |
| Engaging with your team in progressing business development opportunities in a financial services environment | | |
| Leading and engaging your team in the monitoring and evaluating of business development within a financial services environment | | |



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Please contact us for more information:

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