



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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