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Level 3

Senior Financial Services Customer Advisor

Talent Development Programme

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Programme Overview

Welcome to the 15 month, Level 3 Senior Financial Services Customer Advisor programme.

FSTP have designed and develop our unique programme.

During the 15 month programme, employees will cover topics allowing them to develop skills and understanding of the world of financial services, regulation and compliance, financial products and services, building impactful relationships and providing excellent customer service.

Our Senior Financial Services Customer Advisor programme combines outstanding classroom training, dedicated workplace coaching and on the-job experience to build the necessary skills, knowledge and behaviours to become a highly competent Senior Financial Services Customer Advisor professional. In addition participants will work towards a recognised professional qualification.

Awarding Body Partners

Chartered Insurance Institute

The London Institute of Banking & Finance

Standard	Senior Financial Services Customer Adviser
Qualification Level	3
Duration	Typically, this programme will take 15 months to complete
Entry Requirements	You must hold 5 GCSEs (graded A* to C or 9 to 5) or equivalent. • Have Level 2 English and Maths or equivalent. • Have been a resident in the UK/EEA/EU for the last 3 years. • Be able to meet the programme modules through their job role.

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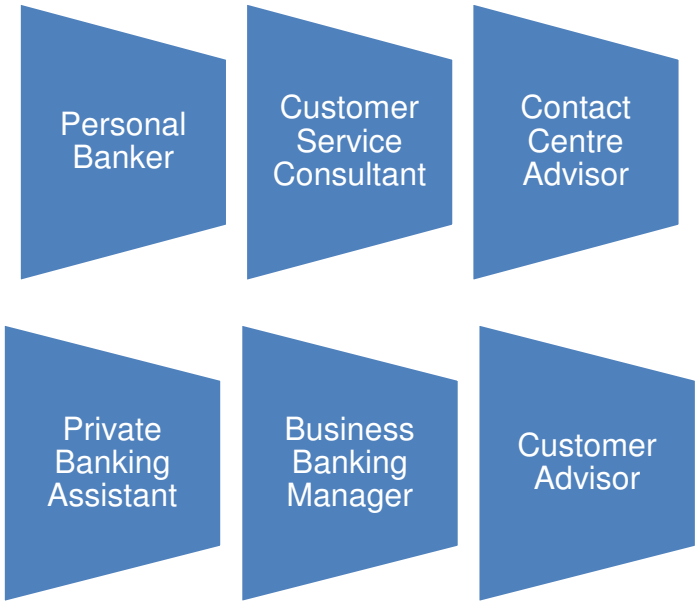
Programme Pathway

Below is an example of a career progression route in financial services...

Typical Job Roles

These are just a few examples of the typical job roles that would suit the level 3 Senior Financial Customer Adviser programme;



Professional Qualifications Available

The London Institute of Banking & Finance

London Institute of Banking & Finance

Chartered Insurance Institute

Certificate in Retail Banking Conduct of Business; Certificate in Business Banking and Conduct; Certificate in Consumer Debt Collection; Certificate for Specialists in Automotive Finance; Certificate in International Trade and Finance.

Chartered Insurance Institute

Chartered Insurance Institute

Certificate In Financial Services; Certificate in Insurance; Award in Financial Administration; Group Risk.

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Modules

Our Level 3 Senior Financial Services Customer Advisor programme gives employees the skills, knowledge and on-the-job training to make them a highly valued member of the team. Here are some of the knowledge development modules in further detail:

Module 1 and 2
World of Financial Services (Part 1 and 2)

- The main purpose of the financial services industry
- Functions of a modern financial system
- The industry's key players
- The customer values shared in financial services
- The client population
- Structure of Regulation

Module 3 & 4
Regulation Masterclass (Part 1 and 2)

- Structure of UK regulation
- PRA/FCA approach to regulation
- Who needs to be authorised
- Specified investments
- High level standards
- How to navigate the regulations
- Conduct of Business rules chapters (as
- relevant)
- CASS/Client money rules
- Complaints, enforcement and redress
- Financial crime

Module 5
Building Impactful Relationship

- The communication tool of persuasion
- The techniques of negotiation
- The power of questioning and listening
- Selling the benefit
- Gaining agreement
- Better relationships with your business
- Managing meetings

Module 6
Understanding Product and Services (Part 1 and 2)

- Wraps and Supermarkets
- Life Products
- Pension Products
- Credit Cards
- Mortgage
- Consumer Lending
- Car Finance
- Insurance Products
- Savings Products

Module 7 & 8
Customer Service (Part 1 and 2)

- Understand why customer service is
- important
- Identify different customers and their
- expectations
- Deal with difficult customers
- Identify "moments of truth"
- Examine how communication can be used
- to improve customer experience
- Understand what vulnerable customers are
- Understand above and beyond
- Complaint handling
- Develop confidence when speaking to
- Customers

Exam Preparation
Session 1 & 2

- Full syllabus walk through
- Highlight areas of common issue for candidates
- Case studies aligned to business activity to amplify learning and application to real life scenarios post exam
- Examples questions and mini exams included
- Access to practitioner and ability to ask questions of tutor

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Learner Journey

Each programme is designed to accommodate the needs of the learner, their job role and the business so the delivery schedule will reflect this. However, as an example of a learner journey throughout the Senior Financial Customer Adviser programme, we have shown a demonstrative 15 month timetable below.

Blended learning

Mentor Visit
An FSTP mentor will visit each participant on a regular basis to support in the workplace, alongside the participants internal support mechanisms, i.e. workplace manager and/or mentor.

Masterclasses
Industry experts will deliver face to face sector specific masterclasses and coaching sessions to provide opportunities to stretch and challenge.

E-learning
Each participant will have individual access to an e-learning environment where additional learning materials can be accessed.

Professional Qualification Resource Workbooks and Online access

Introduction Session

2 hour sessions monthly

Mentor Visits

End Point Assessment
Professional discussion and interview

Portfolio assessment

Months 1- 2

Months 3- 12

Months 12- 15

Training World of Financial Services (Part 1)

Training World of Financial Services (Part 2)

Training Regulation Masterclass (Part 1)

Training Regulation Masterclass (Part 2)

Training Building Impactful Relationships

Training Products and Services (Part 1)

Training Products and Services (Part 2)

Training Customer Service (Part 1)

Training Customer Service (Part 2)

Training Exam Preparation

Senior Financial Services Customer Advisor Apprenticeship Certificate

Awarded!

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20% off-the-job Training

Our programme is designed to facilitate off the job learning, so we can support you (employer) and the participant confidently when evidencing the 20% off the job training; which is a requirement to have been completed within working hours.

Many employers find the demand for off the job training worrying, however, it doesn't need to be. See the table below for some suggested off the job training your apprentices can undertake.

Activity	Example of valid off-the-job training
Classroom sessions / lecture	Block or day release
Workshops and masterclasses	Interactive workshops involving employers
Simulation exercises	Business models and gaming
Online learning	Online training modules and support materials
Shadowing	In work or new departments / locations
Coaching	Support from Line Managers/ colleagues
Industry visits	Within sector or outside of work roles

Please note the above examples are not an exhaustive list, to discuss further please contact us and a member of our team will be happy to help.

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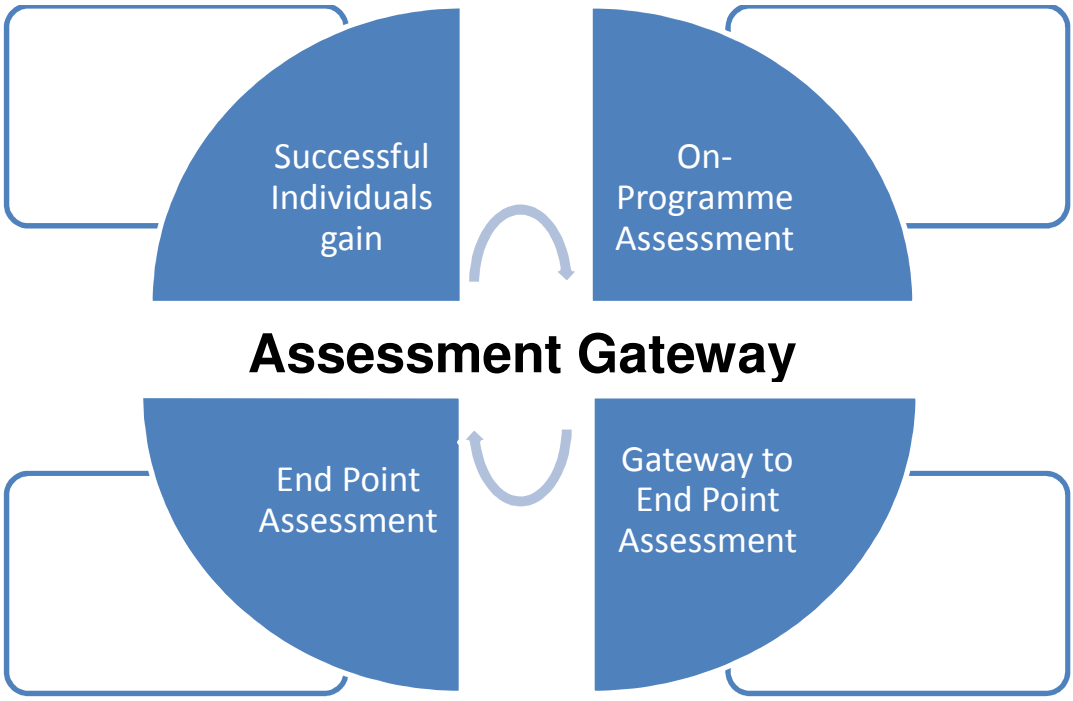
Assessment

This programme consists of two main types of assessments:

On-programme assessments
&
End point assessment (EPA)

The on-programme assessment will involve both yourself, (the employer) and FSTP (your training provider). This assessment will involve each apprentice developing a portfolio that demonstrates the learning and development activities with their application in the workplace.

The assessment is ongoing throughout the programme and apprentices will be provided 360-degree feedback throughout their development of the portfolio.



End Point Assessment

As your training provider, FSTP cannot deliver your end point assessment as this must be carried out by an independent end point assessment organisation

Deciding who to use as an end point assessment organisation can be a difficult choice, at FSTP we have partnered with a number of end point assessment organisations to help you (the employer) with this decision. If you feel our existing partnerships are not right for you then we will work with you to identify the right end point assessment organisation.

It is our aim to make sure that you work with an end point assessment organisation that supports your business, the apprentices and the job role, whilst providing you with the confidence that the training and qualifications are best suited to your objectives.

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The future of training provision

At FSTP we ensure that quality is at the heart of everything we do. We are using our industry knowledge and expertise to provide a range of apprenticeship programmes to the financial services industry that will provide the apprentices with the high standards of training and professional qualification support that we currently provide.

Developing your career pathway with FSTP

Our Apprenticeship programmes are designed with career pathways in mind, taking professionals from GCSE level right up to attaining a degree level professional qualification.

With our expertise within financial services, we aim to provide our apprentices with fundamental skills that will allow the high performing candidates to progress in multiple directions – depending on their career aspirations and development opportunities in your business.

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What are your next steps?

If you would like to find out more about our Level 3 Senior Financial Customer Service Adviser programme, then please contact us.

We would be happy to answer any questions you have about the apprenticeship training we can provide.

Speak to one of our team today!

Call:

0203 178 4230

Email:

info@fstp.co.uk

Website:

www.fstp.co.uk