

National Progression Award — Financial Services

Summary of Course content

The award consists of seven credits earned through completion of four mandatory Units and three optional Units.

Mandatory Units

Regulatory Framework — An Introduction (DV7C 12 — 1 credit)

Develops knowledge and understanding of the regulations relating to money laundering, data protection and relevant codes and practices.

Legislation, Guidelines and Working Relationships (DV7D 12 — 1 credit)

Gives a grounding in the legislation, policies and procedures which impact on internal and external working relationships.

Communication Methods (DV7E 11 — 1 credit)

Focuses on the various communication methods available to the financial services sector.

Personal Development Planning (DV7F 12 — 1 credit)

Enables candidates to understand the value of personal development planning and to identify opportunities for personal development

Optional Units

Promoting Products and Services (DV7K 12 — 1 credit)

Investigates the methods of promoting organisational products and services relating to the role of customer service representatives in the financial services sector.

Customer Service Standards (DV7J 12 — 1 credit)

Promotes an understanding of the role of organisational procedures relating to customer service standards, their impact on service delivery and the ability to identify customer needs and expectations.

Call Handling (DV7L 11 — 1 credit)

Develops effective call handling of customer requests in line with regulatory requirements and the ability to use ICT equipment.

Using Information Communication Technology (DV7H 11 — 1 credit)

Enhances practical ICT skills including data integrity, inputting and accessing information.

Performance Goals (DV7G 11 — 1 credit)

Highlights how organisational goals are set, measured and achieved and how candidates can contribute to the measurement, monitoring and identification of opportunities for improvement of team, departmental and performance goals.