



Senior Financial Services Customer Advisor

A Senior Financial Services Customer Advisor may work in a Bank, Building Society, Financial Advisors, Investment House, Insurance Firm or Hedgefund. Within all of these organisations there are a number of front-line roles that deal with customers and require a high level of technical knowledge and skills across a wide range of products. Depending on the organisation, this may be in store, in branch, over the phone, through the internet, on social media or as part of an operations centre. A Senior Financial Services Customer Advisor role will vary depending on the organisation, where they may be required to deal with individuals, businesses a small portfolio of accounts, or all of these. Products vary depending on the company, but may include banking, savings, insurance, investments and mortgages.

A successful Senior Financial Services Customer Advisor will be able to identify and meet the needs and wants of prospective customers, by identifying and selling the right products and services, whilst also maintaining strong stakeholder relations for repeat business opportunities. This includes proactively calling customers to resolve queries and complaints, and ensure high levels of customer satisfaction through excellent customer service.

Programme Benefits and Outcomes

Your Senior Financial Services Customer Advisor will be able to;

- Develop a range of technical proficiencies, including but not limited to – Professional ethics, Culture and conduct in banking and finance, The principles of risk management, The principles of credit, Effective lending and security, The regulatory and legal framework, Finance and the economy, Effective customer service
- Understand how the skills fit your business needs and implement these effectively
- Develop outstanding professional conduct and customer service

Nationally and Industry Recognised Qualifications

Alongside the programme, your employees will gain a Professionally recognised qualification to support their development, supporting your organisation in developed a high-skilled workforce.

Continuation Courses for your Employees

TEAM LEADING AND MANAGEMENT

Once proficient in a their role, with the skills, knowledge, behaviours and experience needed to thrive in a highly pressurised financial services environment, our tailored pathway courses support your organisation to further progress employees into higher level roles. We do this successfully through tailoring our programmes to the specific needs of your employees' development, alongside the detailed requirements of your business.

Successful completion of the Senior Financial Services Customer Advisor programme can lead onto;

OPERATIONS MANAGER LEVEL 5

**SENIOR INVESTMENT /
BANKING PROFESSIONAL LEVEL 7**

Programme Support and Additional Services

Our programmes are developed to support your business needs in developing the talent, skills and knowledge needed to help your business grow and succeed. Our Senior Financial Services Customer Advisor course also includes the following components;

12 months programme duration

supported through industry recognised qualification

Dedicated Account Manager

monthly meetings to satisfy all your questions, feedback and communication needs

Personalised coach, tutor and assessor

weekly contact for your employees 20% off the job training (face-to-face, virtual and telephone)

Training Costs

Levy businesses can use their contributions to pay for this training. The costs will be £8,000.

If you are not a levy paying business there may not be a cost for this training. If the employee on this programme is under 19 and your business has less than 50 employees, there will be no cost for the training. If they are over 19 and/or your business has over 50 employees then you will contribute 5% towards the cost of the training which would be £400.

Contact us

With Academies throughout the UK, get in touch today to find out how your employees can begin their journey, and how we can support your organisation with your workforce education and training

 01159 580 400

 info@revelationacademy.co.uk

 www.revelationacademy.co.uk

Revelation Academy Limited, St Peters Chambers,
Bank Place, Nottingham, NG1 2JJ



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