

Chartered Banker.

Level 6 Professional Career Development Programme

To check if this programme is suitable for you, ask yourself the following questions:

- Would a professional in my role be expected to display the knowledge, skills and behaviours detailed below?
- Will I have the opportunity to demonstrate the skills detailed below in my current role?
- Will completion of this programme help me to be more effective in my current role?

During the application process your Line Manager will be asked to confirm that this programme is relevant for your role. This is important, as completion of the programme and your professional accreditation relies on your ability to provide evidence that you've learned and applied the skills detailed below back at work.

Knowledge	Learning Outcomes
Industry and Organisation Understanding	Deep understanding of the structure of the Financial Services industry and in particular the role their part of the sector and organisation plays; the purpose of the function in which they work; how their function relates to the wider business. Good understanding of the impact the external environment has on Financial Services as appropriate to their role, together with relevant best practice. Sound understanding of the organisation's 'Values' and professional standards and how these are evidenced through their role. Clearly understands the purpose of the different areas of the organisation they need to work with in their role, and how they support them.
Financial Services Legal/Regulatory/Compliance Framework	Deep understanding of the relevant Financial Services legal and regulatory framework and ethics, and the purpose behind them. Sound understanding of the risk and governance frameworks of their organisation/sector, and how these manifest themselves in the role. Sound understanding of relevant rules and principles for their own role/team. Understands and can clearly articulate the implications of non-compliance for their organisation.
Products and Services	Deep understanding of the relevant Financial Service products and services offered to clients/customers by their organisation, together with sound knowledge of the products and services, and their features and benefits, relevant to their role.
Client/Customer Segments	Sound understanding of the client/customer segments that the organisation delivers to and the channels that they use. Understands the approach to delivering fair client/customer outcomes across the business in a financial services setting, including best practice. Deep understanding of their client's/customer's relevant financial service requirements relevant to their role (internal and external as appropriate)
Systems and Processes	Sound understanding of the organisation's policies and procedures. Sound understanding of the systems, tools and processes used in the role, together with the standards to be met. Proficient in the relevant IT skills, this may include the generic (e.g. excel), and organisation and Financial Service specific software/systems, as required to deliver the role outcomes

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Skills and Behaviours	Learning Outcomes
Client/Customer Relationships	Builds ethically sound and trusted relationships with internal and/or external clients/customers to form the basis of a long-term partnership. Works with client/customers to identify their relevant financial services requirements. Provides flexible and innovative solutions, integrating products and excellent service as appropriate to their role, in order to support client/customers and meet their best interests
Delivering Services	Carries out all required activities, using agreed systems and processes, to ensure that the relevant policies of the organisation for their area of specialisation are met. Takes the initiative to meet challenging individual and team performance measures in line with organisation policy, Values, standards and sector relevant regulatory requirements. Can identify and communicate risks to the relevant management or compliance personnel within the organisation, understanding and following the appropriate company process to address. Delivers projects as required.
Strategy and Planning	Contributes to the development of strategic and operational plans for their area. Manages and reports on progress of specific elements of this in their area of responsibility. Proactively plans and organises their work and time, clearly identifying priorities to meet commitments/KPIs/deadlines.
Problem Solving and Decision Making	Evaluates information quickly and draws accurate conclusions. Assesses a problem from multiple angles to ensure all relevant issues are considered. Gathers the appropriate facts and evidence in order to make decisions effectively, using a structured approach. Responds appropriately to unexpected events.
Communicating and Network	Deals effectively with Client/customers/colleagues at every level of the organisation required by the role. Using strong interpersonal skills and communicating well through a range of media, using language that is meaningful to the recipient e.g. written reports, presentations, phone, face-to-face, email. Communicates complex information clearly. Listens actively to understand needs and adapts their style to the recipient. Engages and networks proactively with Client/customers and colleagues, including senior management, as required, to deliver business outcomes.
Team Working and Collaboration	Builds/maintains strong positive working relationships with Clients/colleagues/suppliers as appropriate. Consistently supports colleagues and collaborates to achieve results. Aware of their role within team, how their team fits within the business, and how the team's decisions impact on others. Takes a leadership role in the team when appropriate.
Continuous Improvement	Identifies opportunities to drive higher performance and improve service/processes delivered, including sharing, and looking outside of their team for best practice. Leads and/or contributes to development of specific changes through to implementation – this may include projects wider than their role.
Developing Self and Others	Keeps up-to-date with sector relevant legal/regulatory changes, and alerts others to the implications where necessary. Seeks feedback and acts on it to improve their performance. Builds their capability through ownership of their own development. Acts as a role model, and supports others in their development as appropriate.
Honesty and Integrity	Truthful, sincere and trustworthy in their actions. Shows integrity by doing the right thing, demonstrating the organisation's Values. Maintains appropriate confidentiality at all times. Visible role model, and coaches others where appropriate. Follows and promotes appropriate organisational procedures and policies.
Adaptability	Adapts positively to changing work priorities and patterns, and is flexible to the needs of the organisation. Demonstrates willingness to adapt approach to assist organisation and individuals to manage priorities as circumstances change, new tasks need to be done, or when business requirements change. Responds well to change.
Resilience and Enthusiasm	Displays energy, determination and enthusiasm in the way they go about their role, dealing positively and with determination when setbacks occur, or when managing difficult situations. Stays positive under pressure, and shows tenacity to follow jobs through to completion.
Innovation and Creativity	Demonstrates a curious and questioning approach in their work. Is creative, innovative and enterprising when seeking solutions to business needs, whilst understanding relevant boundaries e.g. financial services regulations.
Attention to Detail	Handles tasks with thoroughness and accuracy. Takes ownership for the quality of work, and recognises and resolves errors.

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Pathways

You will be required to carry out work based activity related to your selected pathway. Please review the additional knowledge and skills learning outcomes below and select the pathway that is suitable for you and your role.

Retail

Knowledge

Sound understanding of the local business market
Good understanding of resource and cost management principles

Skills

Effectively manages or influences team(s) to deliver excellent customer service, this will include team coaching, performance management and resourcing
Can effectively develop and implement business development and customer contact strategies
Effectively manages resources, staffing and cost/income within their area of responsibility

Commercial

Knowledge

Good understanding of business dynamics (how businesses work and develop)
Understands the range of financial service products and services available to the customer portfolio, including pricing and margins

Understands the local market in which the role operates including financial, economic and market awareness as well as demographics, and nature of the competition

Understand the sector/s in which their business clients/customers operate, together with the tools of excellent customer service and relationship management

Skills

Effectively applies financial analysis techniques relevant to the area of the bank e.g. provide guidance on credit appetite, develop practical and appropriate credit solutions/lending structures; maximise portfolio return
Supports client account planning and growth activities
Able to undertake data/financial analysis, planning and use modeling tools that are required for the role

Operations

Knowledge

Good understanding of processes and project management principles and how they are utilised within their area

Deep knowledge of controls that relate to their own area of work

Knowledge of Operational Risk and how to control it

Knowledge of sector relevant market practises and their impact on the area under ownership

Skills

Effectively manages or influences small teams to deliver excellent customer service in a financial service regulated environment, this will include team coaching, performance management, resourcing and budgetary planning
Demonstrates effective project management skills, and execution of control framework within the sphere of influence of their team

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