



Purpose of the qualification:

This qualification has been designed to provide learners with an all-round introduction to banking. With Prior Learning Centre there are three different streams of this qualification, each with a different bank specialisation in mind. Read through the unit standards (modules) that make up each of the three streams and make your selection based on your personal preferences.

Note that this qualification is a recognised qualification in terms of the Financial Services Board Notice 44 of 2010 under section 1 for category 1 FSPs.

Stream 1: Frontline teller

Processing banking transactions

7327 Transfer and close bank accounts

117763 Prepare, verify and distribute reports

7306 Process banking transactions

7333 Process customer requests for cheque books, counter cheques and bank cheques

Determining the needs of business clients

7345 Determine the banking-related financial needs of a business

115821 Apply business financial practices

Managing cash

7294 Manage the prevention of counterfeiting of currency in a banking environment

7308 Manage cash in till or under counter safe in a banking environment

7324 Take in and control safe custody items in a banking environment

Customer service

7356 Provide sales related services within the banking sector

7337 Process banking customer service requests for moveable asset based accounts

Non-resident bank accounts

7318 Process and Control Non-Resident and Emigrants Bank Accounts/Assets

Stream 2: Direct sales or contact centre

The financial sector

10049 Identify financial implications for making decisions

115821 Apply business financial practices (4 credits)

117781 Explain legislative and regulatory requirements and their impacts

Marketing

10045 Identify product features, advantages and benefits to the customer

117778 Explain Client requirements and Products that satisfy them

Sales techniques

7356 Provide sales related services within the banking sector

7359 Apply banking-related direct selling techniques

7345 Determine the banking-related financial needs of a business

7361 Implement personal selling strategies to achieve banking-related targeted results

7334 Perform external sales process for a bank product

7357 Produce and present banking-related sales solutions

Stream 3: Credit

The financial sector

10049 Identify financial implications for making decisions

115821 Apply business financial practices

Business banking

7345 Determine the banking-related financial needs of a business

7347 Structure a financial solution to meet a business banking need

7355 Prepare a banking-related business credit proposal for the relevant authority

Client services

13300 Present the factual requirements of mortgage finance options

13421 Evaluate the impact of changes to details after bond registration on the finance agreement

7356 Provide sales related services within the banking sector

117778 Explain Client requirements and Products that satisfy them

7335 Update customer records for moveable asset based bank accounts

115367 Demonstrate logical problem solving and error detection techniques

Delivery options

This national qualification can be earned either through traditional training or through recognition of prior learning (RPL). Details are as follows:

Traditional training

Training is best suited to new entrants to the banking sector. Prior Learning Centre can either deliver this qualification as a learnership, which will qualify the sponsoring employer for a tax deduction, or it can be offered as a training programme without the learnership documentation. The duration of the training will be 15 full days, which can be scheduled to suit the employers' schedule.

Recognition of prior learning (RPL)

RPL is ideal for employees with some relevant work experience. Prior Learning Centre offers two RPL options:

Pure RPL: which is best suited for employees with at least five years relevant working experience who are self-motivated and committed to work alone. Contact time is limited to one full day of RPL orientation followed by limited, on-demand contact sessions.

High touch RPL (8 days): this model suits those employees who have at least three years relevant work experience but who may be less motivated to complete their work on their own and they may be unsure of some aspects of the qualification. In this model Prior Learning Centre spends eight full days assisting employees with the theory of the qualification and supervises the completion of their evidence collection. This model generally gives good submission and competency rates.



National certificate in Banking NQF 5: SAQA ID 61589

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