

BUSINESS BANKING PRACTITIONER

(Level 6)

DURATION

18 Months (excluding EISA)
17 Classes (8 Classes if Business
Banking Officer L5 achieved)
4 Work Experience Coaching Sessions

ENTRY REQUIREMENTS

Business Banking Officer NQF level 5 qualification
(SAQA 121927 OC), OR NQF level 4 qualification with
English, Communication and Mathematical Literacy
with 3 years' work experience, AND Access to
relationship banking or business banking workspace.

TOTAL NUMBER OF DAYS OUT OF THE OFFICE

17 (or 8) Contact sessions (9h00 – 16h00)
4 Coaching sessions (09h00-12h00)

Assignments and workplace evidence required.

INTRODUCTION

The purpose of this qualification is to prepare a learner to function as a Business Banking Practitioner. A Business Banking Practitioner works in financial institutions to assist their clients manage their finances in the most successful way possible. This is achieved by facilitating processes to help them navigate the numerous services, procedures and products available, including stocks, bonds, loans, international transactions, real estate, trade credits, insurance policies and more. They also perform analyses of clients' financial services needs to determine the best options to meet these needs.

OVERVIEW OF THE HIGH-LEVEL PROGRAMME

Module 1: Introduction to Business Banking

(Exemption available if Business Banking Officer L5 achieved)

Module 2: Relationship Building

(Exemption available if Business Banking Officer L5 achieved)

Module 3: Customer Financial & Needs Analysis (Small & Micro Businesses)

(Exemption available if Business Banking Officer L5 achieved)

Module 4: Customer Financial and Needs Analysis (Medium Businesses)

Module 5: Business Financing (Small & Micro Businesses)

(Exemption available if Business Banking Officer L5 achieved)

Module 6: Business Financing (Small & Micro Businesses)

Module 7: Small & Micro Businesses Client Portfolio Management

(Exemption available if Business Banking Officer L5 achieved)

Module 8: Medium Businesses Client Portfolio Management

OUTCOMES

A qualified learner will be able to:

1. Maintain and develop efficient relationships with business development teams and promote banking business.
2. Analyse customer portfolios for business banking clients and maintain optimal client relationships for new business acquisition.
3. Establish customer requirements, recommend appropriate loan products and initiate approvals.
4. Monitor all queries for present customers and assist in resolving all issues for new requirements.
5. Design product launches and marketing campaigns while providing optimal levels of customer service and ensuring client satisfaction.
6. Assist commercial clients with all the information required for managing accounts.

WORKPLACE EVIDENCE

Prescribed workplace evidence must be collected and endorsed by the student's mentor/supervisor in the workplace and submitted to NVO for final assessment.

EXTERNAL INTEGRATED SUMMATIVE ASSESSMENT (EISA)

NVO will issue a Statement of Results (SoR) once the programme and all assessments have been completed successfully.

EISA (External Integrated Summative Assessment) exam to be booked directly with BANKSETA once NVO programme is completed.

If applicable, the exam fee is payable directly to BANKSETA. The Novia One mock examination will be venue based to simulate exam conditions as applied by the EISA exam. Students will receive a certificate of competence against the qualification directly from QCTO after successfully passing the EISA.