

Financial Services Administrator

• Level 3 Apprenticeship

As part of the programme, you will be expected to meet the Knowledge, Skills and Behaviours outcomes detailed below.

Your line manager will need to demonstrate how you will meet these outcomes during your programme, by completing a form during the application process.

Knowledge	Learning Outcomes
Insurance market	A broad understanding of the insurance market, insurance law, products and services. A basic commercial awareness and understanding of how the insurance practitioner role supports the business e.g. can describe how an underwriter evaluates and analyses the risk on behalf of a client and how data gathering supports this.
Risk and Regulatory	An understanding of the role of the appropriate regulatory bodies. A good understanding of general insurance and internal compliance activities required, e.g. by completing online regulatory learning modules and knowing who the company's Money Laundering Reporting Officer is.
Clients and Colleagues	An understanding of the importance of the relationships required to be successful in the role and to ensuring client needs are met, e.g. attending industry networking events to broaden your understanding of the relationships required in the market.
Processes and Procedures	A clear understanding of processes and procedures relevant in a specific technical area of delivery and a basic understanding of the impact on the wider organisation and insurance industry, e.g. dealing with a client query successfully to improve client advocacy for the company.
Commercial awareness	An understanding of business benefits and commercial realities. Understanding the wider environment in which an organisation operates; its clients, competitors and suppliers. An awareness of the need for efficient and cost effective practices in relation to the market place within which the company operates, e.g. keeping up to date with industry developments via relevant websites and business publications.

Skills	Learning Outcomes
Technical ability	Adherence to relevant processes and procedures using technical ability and proficient IT skills to deliver positive outcomes for the business, e.g. processing a claim taking into account policy documents and internal processes to meet company and client needs.
Relationship development	Development and management of positive working relationships, through a variety of mediums, handling and resolving client queries through effective verbal/written/IT skills, e.g. working closely with an Account Director to achieve business wins and renewal of existing business.
Effective working	An ability to work in a variety of ways to achieve results, e.g. collaboratively or independently. Demonstrating attention to detail, appropriate time management and a problem solving approach to all work undertaken, e.g. working as part of a team to win new business.
Governance	Demonstration of an understanding of regulatory requirements by working compliantly, including data protection and treating customers fairly. Understanding of specific threats to the business, e.g. ensuring that confidential information is only shared with the relevant people.

Behaviours	Learning Outcomes
Drive to excel	Demonstration of motivation and enthusiasm in the role, remaining positive in challenging situations and constantly seeking to bring out the best of yourself, e.g. uses initiative and drive to ensure a complex client query is followed through to completion.
Communication	Strong verbal and written communication demonstrating active listening, positive questioning and enquiry to build effective relationships, e.g. gathering information from clients to understand their insurance needs.
Personal Accountability	Proactive in personal development, taking initiative and ownership for learning. Demonstrating commitment to the role and the insurance industry, e.g. creating own development plan, identifying opportunities to develop in the role.
Innovation	A creative, imaginative, inquisitive, and challenging approach. Should be able to suggest improvements where appropriate. Proactively able to challenge the status quo, e.g. positively inputting in to meetings and suggesting alternative ways to work.
Professionalism	Displaying honesty and integrity in actions and approach to work and clients demonstrating the principle of utmost good faith, e.g. acts honestly when dealing with customer queries, ensuring that they are treated fairly.