



APPRENTICESHIP

# Providing Financial Services

(General Insurance  
Pathway)

Level 2

# 2

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# Apprenticeship Framework

The aim of the Providing Financial Services (General Insurance Pathway) apprenticeship is to provide the foundational skills and knowledge required to begin a successful career in the insurance industry.

## The programme prepares learners for roles such as:

- Insurance Sales Representative
- Insurance Claims Handler
- Insurance Customer Service Agent
- Underwriting Assistant
- Insurance Brokerage Assistant

## Who is this apprenticeship for?

This qualification is suitable for individuals working within the insurance industry who provide products and services to customers either face-to-face or over the telephone. The foundation apprenticeship will give learners the opportunity to receive recognition for their competence and experience. It has a flexible approach and allows you to select optional units, which meet the requirements of your job role.

## On completion of this apprenticeship, you will achieve the following:

- Level 2 Certificate in Providing Financial Services (General Insurance Pathway)
- Level 2 Certificate in Customer Service
- Level 1 Essential Skills Communication
- Level 1 Essential Skills Application of Number



## Benefits of the apprenticeship programme:

**Accelerate Your Career Growth:** With the Level 2 apprenticeship, you'll fast-track your new insurance career by gaining invaluable hands-on experience alongside theoretical knowledge. You'll be equipped with the tools to thrive and build a fulfilling career in the insurance industry.

**Industry-Recognised Certification:** Upon successful completion of this programme, you'll earn a prestigious industry-recognised certification, providing you with a competitive edge in the job market. Employer's value the skills and expertise gained through this apprenticeship, opening doors to exciting opportunities.

**Practical and Real-World Learning:** Our programme emphasises practical, real-world learning. You'll learn and apply your skills within your workplace, collaborating with experienced colleagues who will guide you through every step of the process. Gain insights, develop your problem-solving abilities, and enhance your decision-making skills.

**Tailored Curriculum:** Our comprehensive curriculum is designed to meet the demands of the constantly evolving insurance industry. You'll cover essential topics such as regulatory arrangements, managing risk, underwriting, claim management and customer relationship management.

**Experienced and Knowledgeable Advisors:** Throughout your apprenticeship, you'll have access to a network of experienced and qualified advisors who will provide guidance, support, and feedback.

## Course Delivery

- Typical duration of 15-18 months.
- Induction session for apprentices and for their line managers.
- One to One tutor coaching and assessment support sessions
- 4 Essential skills assessment days. (2 Preparation Day and 2 Live Task Day) \*\*
- 2 hour long essential skills confirmatory tests. \*\*

*\*\*Essential Skills activities are not applicable to apprentices with exemptions.*



# Level 2 Certificate in Providing Financial Services - General Insurance Pathway

## Course Delivery

This programme will primarily be delivered through 1-to-1 sessions with a member of the ALS delivery team, using a mixture of face-to-face and remote learning sessions. An ALS assessor will meet with the learner, either in the workplace or through digital means (for example, Microsoft Teams) once a month for approximately two hours to support progress.

Learners will also be set tasks to complete between each visit which are tailored to the different needs of each learner and the workplace activities they are involved with.

## Qualification Structure Summary

The Certificate in Providing Financial Services (General Insurance Pathway) consists of 3 mandatory units with a total of 14 credits plus a minimum of 7 optional credits.

Unit rules of combination.

- Mandatory Units (Learners must achieve all 3 units) – 14 credits.
- Optional General Insurance units – minimum 6 credits.
- Further Optional units – minimum 1 credit.

## What you will learn

This programme is made up of a mixture of mandatory units (these have to be completed by all learners as part of the qualification) and optional units (we will work with you to decide what units are relevant to your role, and your business).

A brief overview of these units is below.

### Mandatory Units

Unit Title	Level
Complying with regulations within the financial services environment.	2
Improving and maintaining workplace competence in a financial services environment.	2
Planning and organising work in a financial services environment.	2

### General Insurance Optional units (minimum 6 credits)

Unit Title	Level	Credit
Agreeing the settlement of straightforward claims for uninsured losses.	2	5
Building effective relationships with clients in a financial services environment.	2	3
Dealing with requests to cancel financial services products or services.	2	4
Dealing with straightforward claims for insured losses.	2	5
Processing straightforward claims for uninsured losses.	2	5
Processing straightforward insurance business as an intermediary.	2	5
Processing straightforward insurance policy documentation.	2	5
Processing straightforward insurance renewals.	2	5
Processing straightforward insurance renewals as an intermediary.	2	5
Processing straightforward mid-term amendments.	2	5
Processing straightforward new insurance claims notifications.	2	5
Providing information to customers in a financial services environment.	2	4
Settling straightforward insurance claims.	2	5
Underwriting straightforward new risks.	2	5

### Further Optional units (minimum 1 credit)

Unit Title	Level	Credit
Dealing with customers by telephone in a financial services environment.	2	4
Deal with customers using bespoke software.	2	5
Deliver reliable customer service.	2	5
Generating and qualifying sales leads.	2	2
Give customers a positive impression of yourself and your organisation.	2	5
Resolve customer service problems.	2	6
Selling by telephone – inbound/outbound.	2	4

### Have any questions about our Level 2 Certificate in Providing Financial Services (General Insurance Pathway)?

We are here to help. If you have any further questions or enquiries about the main qualification element of the programme, please contact at [info@alstraining.org.uk](mailto:info@alstraining.org.uk)



# Level 2 Certificate in Customer Service

## Course Delivery

This element of the course will be delivered alongside the certificate in providing financial services. through 1-to-1 sessions with a member of the ALS delivery team, using a mixture of face-to-face and remote learning sessions. An ALS assessor will meet with the learner, either in the workplace or through digital means (for example, Microsoft Teams) once a month for approximately two hours to support progress.

Learners will also be set tasks to complete between each visit which are tailored to the different needs of each learner and the workplace activities they are involved with.

## Qualification Structure Summary

The Level 2 Certificate in Customer Service consists of 2 mandatory units with a total of 13 credits.

## What you will learn

Unit Title	Level
Delivery of Effective Customer Service	2
Supporting the Customer Service Environment	2

## Have any questions about our Level 2 Certificate in Customer Service?

We are here to help. If you have any further questions or enquiries about the main qualification element of the programme, please contact at [info@alstraining.org.uk](mailto:info@alstraining.org.uk)



# Essential Skills Qualifications

When you agree to undertake an apprenticeship, you may be required to complete Essential Skills as part of your Apprenticeship framework.

## Essential Skills Wales

The Essential Skills Wales (ESW) will be initially assessed via an online Wales Essential Skills Toolkit (WEST) Assessment. Where a Learner already holds an ESW certificate or equivalent qualification this can provide an exemption and learners will not need to complete that ESW element of the programme. Where a Learner is not exempt an Individual Learning Plan (ILP) will be generated from the initial assessment. The modules delivery will include independent learning via WEST, prior to guided learning sessions preparing the Learner for their assessment. ESWs are assessed via controlled tasks and confirmatory tests for Communication and Number.

## Exemptions

If you already hold qualifications, these may be used as 'exemptions' towards your apprenticeship framework. As a result, you will be exempt from achieving that particular Essential Skill. All applications for exemption will be checked and confirmed at the start of your apprenticeship. This will be discussed with you before you sign up with and will be followed up by your assessor before your first visit.

### Have any questions about Essential Skills?

We are here to help. If you have any further questions or enquiries about Essential Skills element of the programme, please contact [info@alstraining.org.uk](mailto:info@alstraining.org.uk)