



BCONSULT

Occupational Certificate

BANK CUSTOMER SERVICES CLERK

NQF Level 4 | SAQA ID 101710 | 51 Points | 12 Months

Occupational Certificate:

Bank Customer Service Clerk – NQF Level 4

SAQA ID: 101710 | Credits: 51 | Duration: 12-month | QCTO Learnership

1. Course Overview

The Occupational Certificate: Bank Customer Services Clerk is designed to prepare learners for a frontline customer service role within the banking sector. Bank Customer Services Clerks are the first point of contact for customers, providing guidance, delivering a wide range of banking services, resolving queries, and promoting products and services.

Learners will develop strong customer service, administrative, and risk-management skills while working within a regulatory banking framework. This qualification supports career mobility in banking and contributes to professional customer service standards across the industry.

2. Learning Outcomes

On completion of this qualification, learners will be able to:

- Apply factual, conceptual, and procedural knowledge relevant to banking customer services.
- Deliver a range of banking services accurately and efficiently across all channels.
- Handle customer interactions, including difficult situations, with professionalism and empathy.
- Promote banking products and services while minimising operational and compliance risks.
- Apply ethical conduct, confidentiality, and emotional intelligence in customer service environments.

KNOWLEDGE MODULES

Curriculum Code	Knowledge Module	NQF Level	Credits
421102001-KM-01	Workplace Fundamentals	4	3
421102001-KM-02	The banking industry and banking rules and regulations	4	4
421102001-KM-03	Customer service and satisfaction	4	3
421102001-KM-04	Banking products and services	4	4
421102001-KM-05	Security at banks	4	2

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PRACTICAL SKILLS MODULES

Curriculum Code	Practical Skills Module	NQF Level	Credits
421102001-PM-01	Complete and process banking services	4	8
421102001-PM-02	Achieve customer satisfaction	4	4
421102001-PM-03	Minimise risk in a banking environment	4	2

WORKPLACE MODULES

Curriculum Code	Workplace Code	NQF Level	Credits
421102001-WM-01	Completion and processing of services across all banking channels	4	9
421102001-WM-02	Processes to achieve customer satisfaction	4	6
421102001-WM-03	Processes to minimise risk to client and the bank	4	5
421102001-WM-04	Meeting processes	4	1

3. **A Qualified Learner Will Be Able To:**

- Complete and process banking services according to bank policies and regulatory standards.
- Achieve customer satisfaction through effective communication, problem-solving, and service delivery.
- Minimise risk to the client and the bank through adherence to security, compliance, and operational protocols.

Entry Requirements

- A **Level 4 qualification with Mathematical Literacy** (or equivalent).
- Recognition of Prior Learning (RPL) is available for learners who demonstrate relevant workplace experience or prior study.

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4. International Comparability

This qualification aligns closely with international banking and customer service training standards:

- **United Kingdom:** NVQ Certificate and Diploma in Customer Service (Levels 2 and 3) and City & Guilds Customer Service qualifications.
- **Australia:** Certificate IV in Banking Services, encompassing client relationships, compliance, and customer service skills.
- **United States:** American Institute of Banking (AIB) Customer Service Representative Certificate.
- **New Zealand:** Customer service and retail support qualifications at Levels 2–3.

Comparability confirms that the South African qualification addresses similar competencies to those required by customer service personnel in international banking systems, particularly in the UK and USA.

5. Occupational Trainer – NQF Level 4 Certification

- **Occupational Certificate (QCTO)**
- **NQF Level: 4**
- **Sub-framework:** OQSF – Occupational Qualifications Sub-framework

6. Potential Career Opportunities

Graduates of this programme can pursue a variety of roles in the banking and financial services sector, including:

- Bank Customer Services Clerk
- Banking Client Services Consultant
- Customer Support Officer (Banking)
- Teller transitioning into customer service roles
- Relationship Banking Assistant
- Junior Banking Operations Officer

Progression opportunities exist to supervisory or specialist roles through further study, such as the **National Certificate in Banking (NQF Level 5)**.

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7. Learning Options

This programme is available through:

- **Classroom-based learning** at accredited training institutions.
- **Workplace-based learning**, integrating theory with practical application.
- **Blended learning** (where offered), combining online modules with workplace experience.

The qualification is assessed through internal formative assessments and an **external integrated summative assessment** conducted by an accredited QCTO Assessment Quality Partner.

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