

1 *Watching*
a training video



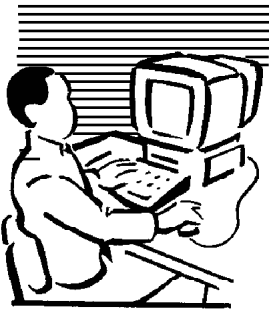
2 *Reading*
a training manual



3 *Working*
in customer service



4 *Using*
office equipment



5 *Working*
on a computer



6 *Observing*
a customer interview



7 *Interviewing*
a manager



8 *Reviewing*
company literature



9 *Observing*
a cashier



10 *Talking*
on the telephone

NAME _____

GROUP _____

PLACEMENT _____

Work Experience **IN FINANCIAL SERVICES**



Supported by



**Work Experience Learning Framework
for Post-16 Students**

Assignment 1: Level 2

Balancing the books

Why is it important for a company to monitor financial transactions? What are the methods of payment available to individuals and companies? What types of receipt documents are there? What type of services do banks provide for small businesses? You should provide examples of documents to illustrate your answers.

Evidence: Examples of each type of financial document; notes from interview with small business adviser; bank/building society information leaflets; notes from interview with customer services manager.

Key Skills: Communication (take part in discussions; read and respond to written material; produce written material).
Improving Own Learning and Performance (set targets and plan action; follow your plan to meet targets).
IT (use a computer to: prepare information; process and present information).

Assignment 2: Level 2

How can I help you?

By talking to the staff in your placement bank/building society find out why customer service is important to the branch. Observe closely how customers are dealt with and how complaints are handled. How is customer satisfaction monitored? Present your results in the form of a check-list for effective customer service.

Evidence: Notes from interviews with customer service staff; notes on observation of customer service in action; company literature on customer service; extracts from training manuals; training videos; extracts from company monitoring reports.

Key Skills: Communication (take part in discussions; read and respond to written material; produce written material).
IT (use a computer to: prepare information; process and present information).
Improving Own Learning and Performance (set targets and plan action; follow your plan to meet targets).

Assignment 3: Level 3

Making ends meet!

You have been asked to write an article for the student newspaper on banking services available to students. You should provide a clear and objective guide to the range of services and include advice on the importance of budgeting. You might wish to provide some examples of typical student budgets showing likely income and expenditure. Remember to highlight common problems and show how they might be avoided. Try to keep the article lively and amusing as well as accurate and informative.

Evidence: Literature on bank/building society products, particularly those aimed at young people; notes from interviews with student services manager; data on customer profiles.

Key Skills: Application of Number (collect and record data).
IT (use a computer to: prepare information; process and present information).
Communication (take part in discussions; read and respond to written material; produce written material).
Improving Own Learning and Performance (set targets and plan action; follow your plan to meet targets).