

Chartered Banker

PROFESSIONAL BANKER CERTIFICATE MODULE SPECIFICATION

Title:	Team Leadership in Financial Services
Credit Value:	SCQF Level - 8 SCQF Credit Points - 10
Aim:	<p>To provide those who are leading, or aspiring to lead a team with an introduction to team leadership in financial services, focussing on:</p> <ul style="list-style-type: none">• Understanding how teams operate in the financial services workplace• Understand how teams are led• Understand the requirements of leadership in financial services teams <p>The module considers elements of theory, but employs a practical approach which is intended to empower learners to apply what they have learned.</p>
Access Statement:	It is recommended that learners should have previously studied at SCQF Level 5 or above and have experience of working in a team.
Programmes of study to which unit contributes:	<ul style="list-style-type: none">• Professional Banker Diploma
Learning Outcomes:	Knowledge, Understanding and Skills On completion of this module, the learner will be able to: 1. Understand how teams operate in the financial services workplace. 2. Understand how teams are led. 3. Understand the requirements of leadership in financial services teams.
Method of Delivery:	Study Text and study guide.
Assessment:	One summative on-line objectively tested (multiple choice) examination comprising 100 questions.

Learning Outcomes, Assessment Criteria and Content

Learning Outcomes	Assessment Criteria	Indicative Content
<i>The learner will be able to:</i>	<i>The learner can:</i>	
Team leadership in financial services		
<p>1. Understand how teams operate in the financial services workplace.</p>	<p>1.1 Identify types of teams in financial services. 1.2 Explain organisational structures. 1.3 Explain the main management theories. 1.4 Explain motivation theory. 1.5 Explain group dynamics in teams.</p>	<ul style="list-style-type: none"> • Teams in the financial services workplace. • Types of Teams – formal and informal groups. • The role of the team leader. • Contemporary organisation structures. • Teams and organisational structure and culture. • Management theory. • Motivational theory.

Learning Outcomes	Assessment Criteria	Indicative Content
<i>The learner will be able to:</i>	<i>The learner can:</i>	
Team leadership in financial services		
2. Understand how teams are led	2.1 Explain performance management. 2.2 Identify the importance of effective communication. 2.3 Explain how to set and monitor objectives. 2.4 Identify the appropriate approach for monitoring the quality of team workflows.	<ul style="list-style-type: none"> • Building a team. • Reward and motivation. • Set performance objectives and standards. • Team objectives and performance. • Managing underperformance. • Handling objections. • Communication in the workplace. • Identifying appropriate communication channels. • Quality.

Team leadership in financial services		
3. Understand the requirements of leadership in financial services teams.	3.1 Identify how to optimise team performance. 3.2 Explain how to manage challenging situations. 3.4 Explain the role of performance coaching. 3.5 Identify strategies for managing change. 3.6 Identify ethical issues	<ul style="list-style-type: none"> • The characteristics of high performance teams in financial services. • The coaching process. • Managing change. • Managing conflict during change.

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