

# Banking customer service adviser

Alternative titles for this job include

Banking customer service advisers provide a face-to-face service in banks and building societies.

## How to become

Explore the different ways to get into this role.

You can get into this job through:

- A college course
- An apprenticeship
- Applying directly

## College

Taking a college course like a Level 2 or 3 Diploma in Customer Service could help you to develop skills for this role.

## Entry requirements

You'll usually need:

- 2 or more GCSEs at grades 9 to 3 (A\* to D), or equivalent, for a level 2 course
- 4 or 5 GCSEs at grades 9 to 4 (A\* to C), or equivalent, for a level 3 course

## More Information

- [equivalent entry requirements](#)
- [funding advice](#)
- [search for courses](#)

## Apprenticeship

You can get into this job through a financial services customer adviser intermediate apprenticeship or a senior financial services customer adviser advanced apprenticeship.

## Entry requirements

You'll usually need:

- some GCSEs, usually including English and maths, or equivalent, for an intermediate apprenticeship
- 5 GCSEs at grades 9 to 4 (A\* to C), or equivalent, including English and maths, for an advanced apprenticeship

### **More Information**

- [equivalent entry requirements](#)
- [guide to apprenticeships](#)

### **Direct Application**

Entry requirements vary between employers if you want to apply directly.

You may find it useful to have 4 or more GCSEs at grades 9 to 4 (A\* to C) or equivalent qualifications, including English and maths.

Some employers may ask you to pass selection tests when you apply.

### **More Information**

#### **Career tips**

Customer service, cash handling and computing skills will be useful.

#### **Further information**

You can find out more about careers in finance from the [London Institute of Banking and Finance](#).

### **What it takes**

Find out what skills you'll use in this role.

### **Skills and knowledge**

You'll need:

- customer service skills
- to be thorough and pay attention to detail
- the ability to work well with others
- patience and the ability to remain calm in stressful situations
- administration skills

- the ability to sell products and services
- sensitivity and understanding
- excellent verbal communication skills
- to be able to use a computer and the main software packages competently

## **Restrictions and Requirements**

You'll need to:

- pass [enhanced background checks](#)

## **What you'll do**

Discover the day to day tasks you'll do in this role.

### **Day-to-day tasks**

You will:

- process payments and withdrawals
- set up and maintain customers' accounts
- deal with calls, emails and face-to-face enquiries
- promote and sell financial products and services to customers
- use the IT system to update account details
- do general administration tasks
- operate UK and overseas currency tills
- help customers who can, to self-serve in the branch using digital apps

## **Working environment**

You could work in a bank or in a contact centre.

You may need to wear a uniform.

## **Career path and progression**

Look at progression in this role and similar opportunities.

With experience, you could progress to specialist customer service and advice roles, or into management.

You might also be able to apply your customer service skills in corporate or investment banking.