

# **LIBF Level 4 Certificate in Relationship Management (CertRM)**

Qualification Specification



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**Please Note** - Uncontrolled document when printed.

Please always review the latest document available through the website.

## Purpose of the qualification

### Why study LIBF Level 4 Relationship Management (CertRM)?

In Banking, professional relationships are key to providing the best customer outcomes and for adding value to the business. The Certificate in Relationship Management (CertRM) is of particular interest if you are new to the role and you have responsibilities within business banking, commercial banking and / or corporate relationship management, or if you are keen to improve your understanding and application of the skills and tools that aid you in a relationship manager role. In completing this qualification, you will develop and enhance your skills in business planning, account portfolio management, and the role of the relationship manager as a trusted adviser, particularly with a focus on anticipating, identifying and satisfying customer needs profitably.

The CertRM is set at Level 4<sup>1</sup> and provides credit into the Professional Diploma in Banking & Finance designation offered through The London Institute of Banking & Finance.

### Objectives

As a comprehensive course focusing on relationship management, the qualification develops specialist knowledge and skills by introducing you to the strategic context and organisational implications of relationship management within the financial services industry.

### Key content areas

- the environment in which businesses operate;
- the different types of business customer;
- the role of relationship management and relationship marketing;
- the role of the relationship manager as a trusted adviser in identifying and supporting customer needs;
- the importance of effective communication; and
- the importance of business plans and the relationship to portfolio management together with key account and portfolio planning.

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<sup>1</sup> Ofqual Regulated Qualifications Framework (RQF).

## Qualification learning outcomes

On completing this qualification, in the context of the financial services sector you will:

LO	Detail
LO1	Understand the commercial environment in which businesses operate
LO2	Understand and identify the different types of business customer
LO3	Explain relationship management principles
LO4	Understand business plan analysis and the role of the relationship manager in business development and customer retention
LO5	Understand portfolio planning

## Key skills developed

The qualification will encourage you to:

- develop your ability to work with customers of varying complexity.
- develop your ability to manage customers and situations.
- increase your ability to work and study independently and utilise resources effectively.

## Entry requirements

There are no specified entry requirements. However, you need to be satisfied of your ability to study in English.

## Recognition of prior learning

In line with the London Institute of Banking & Finance regulations, as CertRM is a single unit qualification, recognition of prior learning does not apply.

## Progression and preparation for further study

CertRM provides a platform for continued study within the financial services sector and a wide range of other business-related disciplines.

Upon successful completion of the Certificate in Relationship Management (CertRM) qualification, there are opportunities for further study with The London Institute of Banking & Finance. CertRM forms part of the [Professional Diploma in Banking & Finance](#) designation.

On successful completion of the Professional Diploma in Banking & Finance designation, you will be eligible to apply for Associate membership status of The London Institute of Banking & Finance.

### Apprenticeships

CertRM is not currently available through an apprenticeship standard.

### Preparation for employment / professional development

CertRM is a professional development qualification which is designed to develop knowledge and understanding of relationship management within financial services and enhances skills that are valued within that sector and others.

### Structure

CertRM is made up of **one mandatory unit** which must be successfully completed to achieve the qualification:



### Total Qualification Time (TQT)

Total Qualification Time (TQT) is a prediction of the total time a student with no prior knowledge might need to complete the course.

TQT consists of two elements, Guided Learning (GL) and all other hours:

- GL is time spent studying under the immediate guidance or supervision of a teacher (including webinar and forum).
- All other hours include hours spent unsupervised in research, learning, e-learning, e-assessment, completing coursework, exam preparation, and formal assessments.

CertRM is primarily considered as a distance learning qualification with on-demand examinations through Pearson VUE.

Guided Learning Hours	7 hours
Other hours	193 hours

Total Qualification Time          200 hours

## Learning resources

CertRM is available as a distance learning qualification, it allows you to study independently with comprehensive learning materials and study guides. Practical (non-academic) support is available from The London Institute of Banking & Finance Student Services.

You are provided with the following learning resources:

- online access to the core text through **MyLIBF**- [www.myLIBF.com](http://www.myLIBF.com);
- access to KnowledgeBank (e-library) through **MyLIBF**;
- unit syllabus;
- study planner;
- specimen assessments;
- online e-quizzes and activities;
- webinars; and,
- 'ask the expert' (tutor-led) forum.

## What to do before the assessment

You must be registered to sit the examination at a centre of your choice (subject to demand / availability); this is managed by you. Examinations are sat electronically at any one of the 150 Pearson VUE test centres across the UK. It is recommended that examinations are booked two months in advance of the date you wish to sit. However, subject to availability, an examination can be booked as little as two working days in advance. Examinations can be booked over the phone or via the [Pearson VUE website](#).

Upon registration for the qualification, you will be allocated to a specific coursework session.

Coursework is submitted via the course site; once submitted, all assignments are checked by TurnitinUK. TurnitinUK is an originality checking and plagiarism prevention service. Guidance on the submission process, TurnitinUK and referencing is provided on the course site.

To prepare for all assessment elements, you should make use of all learning resources.

## Assessment

CertRM has two assessment components:

1. An examination comprising 30 multiple-choice questions. A total of 30 marks are available and the pass mark is 70%.
2. A 2,000-2,500 word coursework assignment. A total of 50 marks are available for the coursework and the pass mark is 50%.

The structure of the assessment ensures that all course content is subject to assessment.

## Qualification grading

The overall qualification is graded pass only. To achieve a pass, you must achieve at least 70% in the examination and at least 50% in the coursework.

Assessment	Total marks	Pass
MCQ examination	30	70%
Coursework assignment	50	50%

For the examination, feedback is provided via an analysis sheet available on [www.MyLIBF.com](http://www.MyLIBF.com).

Levels based feedback is provided for the coursework.

## Registration period

CertRM has a nine month registration period.

## Resubmission and re-sit attempts

### Exam

There are no restrictions on the number of times you can resit the MCQ examination, although each resit will require a re-registration and incur a fee.

### Coursework

If you fail the coursework assignment it is possible to resubmit. More details can be found in the resubmission guide which can be found on your course site.

If fail your resubmitted piece of coursework you are able to pay to re-register. There are no restrictions on the number of times you can re-register.



## Appendices

### Appendix 1 – Regulation detail

This document describes the regulation detail that is applicable to the qualification.

<b>Qualification title</b>	LIBF Level 4 Certificate in Relationship Management (CertRM)
<b>Ofqual qualification number</b>	603/1415/1
<b>Qualification level</b>	4
<b>European Qualifications Framework (EQF) level</b>	5
<b>Qualification Type</b>	Other General
<b>Guided learning hours</b>	7 hours
<b>Total qualification time</b>	200 hours
<b>Total credits</b>	20
<b>Sector Subject Area</b>	15. Business, Administration, Finance and Law
<b>Sub SSA</b>	15.3 Business Management
<b>Overall grading type</b>	Pass
<b>Assessment methods</b>	Multiple-choice and Coursework
<b>Regulated in</b>	England
<b>Qualification for ages</b>	19+
<b>Operational start date</b>	15 May 2017
<b>Qualification description</b>	CertRM consists of one mandatory unit. A total credit value of 20 must be obtained for achievement of the qualification.