

# Student Workbook

## Welcome to CareerSense, the Discovery Activity!

Have you ever wondered what people working in financial services actually do? Well, we'd like to help you understand more about the type of roles you might carry out and the skills and capabilities you'll need in the future, for working not only in the financial sector, but across a range of other sectors too.

Your challenge today is to complete six different tasks.

You'll find everything you need in this Workbook, and you can type your answers directly into the document.

### Let's get started.

Your teacher will have already introduced you to this activity, but in case you missed it, here's a video which explains what skills and capabilities are needed in financial services now and for the future.

## Task 1: Improver Innovator



Watch this video to find out what your first task is all about:



Lori  
Agile Scrum  
Master

**Can you help the Strategy Team decide which of these software tools are the best for their team? There are no right or wrong answers, but you'll need to explain your choice.**

#### What does the software need to do?

It needs to allow them to collaborate and collectively create and view their work items for the next 12 weeks.

## Software A

Pros	Cons
Software A is widely available. All of our colleagues are familiar with the software and have used it before. A lot of people can update it at the same time.	People working outside of the business can't access the documents on the software due to access restrictions. Also Software A doesn't let more than one person be assigned to a single piece of work, and it can be dull to look at.

## Software B

Pros	Cons
Software B has better visual content and is great for keeping the audience engaged. It's highly collaborative as everyone can update it at the same time, and people inside and outside the bank can access it, provided they are invited by the meeting host.	Most of the people in the team haven't used the software before, and as Software B isn't yet fully approved for use and is in a pilot stage of testing, the team must be careful about what details are added to the software, and that no sensitive content is included which makes the business identifiable.

## Software C

Pros	Cons
Software C is also widely available in the bank and it allows more than one person to be allocated to a piece of work. People outside of the business can also be given access. Many people can update information using the software at the same time.	Software C hasn't been used by many colleagues in the business and is quite dull to look at, but not as dull as Software A.

I would choose software \_\_\_\_\_ because:



## Task 2: Critical Thinker

Watch this video to find out what your second task is all about:



Sian  
Data Quality  
Manager

We need your help!

Can you help me find which data is the most likely match for each of our three customers? Take a look at the data on page three.

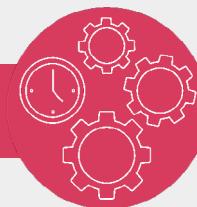
Can you match the right information with the right customer?

Name	Hamza	Danielle	Sharon
Background	Hamza is currently completing an apprenticeship and is excited about travelling the world next year.	Danielle is self-employed and has her own social media company.	Sharon is semi-retired and spends a lot of time using technology for both work and leisure.
Date of birth			
Job title			
Salary			
Bank products used			
Transactional data (what they've spent money on)			

### Data to analyse:

Date of birth:	17.03.1964	03.12.2000	23.10.1901	15.06.1949
Job title:	Business Administrator	Software Engineer	Facilities Manager	Director
Salary	£86,000	£20,000	£17,500	£55,000
Bank products used	Pension advice	Savings account	Life insurance	Pension advice
Transactional data (what they've spent money on)	Cash withdrawal - £200	First Bus Monthly ticket - £25	Balance Transfer - £5,000,000	Facebook Adverts - £150

## Task 3 : Change Ready



Play this interactive task and discover if you are Change Ready:



## Task 4: Trusted Advisor

Watch this video to find out what your fourth task is all about:



**Amy**  
Senior  
Relationship  
Manager

**Now you've watched the video, can you help Amy find the best way to approach the potential customer as a Trusted Advisor?**

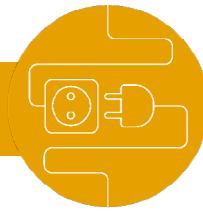
**Choose three actions she could take and explain why you've chosen them below.**

<b>A.</b> <b>Do some research about their sector (e.g. retail) so you can talk to them about it and build a relationship with them</b>	<b>B.</b> <b>You have loads of different services you could offer, so describe them all and see how many you can get them to sign up for</b>	<b>C.</b> <b>Keep in touch with the customer often, and call when you promise to</b>
<b>D.</b> <b>Make sure they're genuinely impressed by the way you describe what you can offer them, even if you exaggerate a little</b>	<b>E.</b> <b>Recommend some simple changes they could make to their banking to make it easier and cheaper</b>	<b>F.</b> <b>Offer the same services as their existing bank but at a cheaper price</b>
<b>G.</b> <b>Wait for them to contact you as you'll know they're interested then</b>	<b>H.</b> <b>Answer any questions they have when they call and try to help them even if you're busy</b>	<b>I.</b> <b>Look out for and share, interesting press articles about their sector to show you are interested in them and their business</b>

I think Amy should take the following actions:

Action <u>  </u>	Action <u>  </u>	Action <u>  </u>
I've chosen this because ...	I've chosen this because ...	I've chosen this because ...

## Task 5: Connected



Play this interactive task and discover if you are Connected:

## Task 6: Exploring Your Potential

Now that you've discovered some of the skills and capabilities shown by a range of NatWest Group employees, it's time to explore where your potential lies.

### Exploring your potential quiz

Knowing what capabilities you're most drawn to is important as you prepare for jobs in the future, especially as some of these jobs may not even exist yet!

Take our quiz to discover more about which capabilities you currently use most and then use this to help you explore how you can develop yourself further. Tick the answer which feels most like you.

#### Q1. You've dropped your mobile phone and need to replace it. What do you do?

A. <input type="checkbox"/>	B. <input type="checkbox"/>	C. <input type="checkbox"/>	D. <input type="checkbox"/>	E. <input type="checkbox"/>
You already try out the tech at the phone store most weekends, so you already know which is best.	You read all the tech reviews, and look at the different options available, to decide which is the best phone for you.	You're not worried as these types of things happen. One of your friends has told you about an offer at the moment, so you'll give that one a try.	You explain to your parents what's happened and offer to do household chores to help pay for a new one.	Discussing what is the best phone is what lunch break chats with your mates are made for, right?

**Q2. Friday night is looming, and you want to meet your friends for a catch up. What do you do?**

A. <input type="checkbox"/>	B. <input type="checkbox"/>	C. <input type="checkbox"/>	D. <input type="checkbox"/>	E. <input type="checkbox"/>
It's hard to get everyone to agree on an idea, so you suggest a digital poll in your group chat to help you decide what to do.	Put together a list of ideas with pros and cons and share with your friends – you'll use their feedback to suggest the best option.	Rather than head to your friend's house as usual, you've heard there's a new shopping centre opening in town, so you suggest meeting there.	Your friend has told you that they've had some bad news, so you suggest meeting up at yours to give them a chance to chat.	Get together with your friends and discuss the options – you want to make sure everyone has a say.

**Q3. Your class has got a coursework deadline coming up. What do you do?**

A. <input type="checkbox"/>	B. <input type="checkbox"/>	C. <input type="checkbox"/>	D. <input type="checkbox"/>	E. <input type="checkbox"/>
Use an online project board to map out what you need to do so you get everything done on time.	Make a mind map of all the information so you can see the 'bigger picture' of where it all fits together – and then choose what's important to focus on.	Spend some time considering what you need to do so that you're able to meet the deadline and do a good job, as well as balance this with some relaxation too.	Your mate messages you to say that they don't know where to start. You listen to their concerns and tell them not to worry, you know how they feel!	You ask your friends for advice on what you need to do – they had some great ideas and you were also able to share with them some tips that you've come across.

**Q4. Your friend is upset and asks for your advice. What do you do?**

A. <input type="checkbox"/>	B. <input type="checkbox"/>	C. <input type="checkbox"/>	D. <input type="checkbox"/>	E. <input type="checkbox"/>
Help them think about what they can do to make a positive change to improve things, using your own experiences to support them.	You make a list of pros and cons to weigh up the best way to respond to their problem, helping them understand what's most important.	You remind your friend that they need to focus on looking after themselves; their well-being is the most important thing.	You try to be honest as you can as you help them find a solution. As a trusted friend, you know they'll listen to you without being offended.	Spend time talking to your friend and listening to why they're upset, so you can give them some really good advice that's best suited to them.

Count up how many ticks you got for each using the table below.

Total scores				
A.	B.	C.	D.	E.

You're likely to have a mix of capabilities, but which capability do you relate to most?

## Mostly A's:



### Improver Innovator

Your responses show that making improvements is important to you and you can see the value in learning from experience. You're likely to make the most of digital tools and technology and spend your free time finding out more.

## Mostly B's:



### Critical Thinker

Likely to enjoy gathering information to help solve problems and make decisions. Your responses show that you're thinking about the bigger picture and can weigh up the pros and cons to make sense of what you've found out.

## Mostly C's:



### Change Ready

Your responses show that you're open to change and learning new things. You're likely to take the time look after yourself and your own well-being.

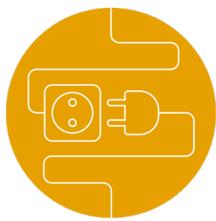
## Mostly D's:



### Trusted Advisor

Your responses show that you tend to gravitate towards building good relationships with others and do this through empathy and warmth. You're open and honest and take responsibility for your actions.

## Mostly E's:



### Connected

Your responses show that you enjoy working with others and spend time learning from each other. You can communicate well and listen to and take on board feedback from others.

**Did you find you used a mixture of capabilities? That's great – it means you're able to use different capabilities depending on the situation.**

## How to maximise your potential

The quiz has helped you see what you enjoy doing, but how can you develop across all capabilities? There are lots of things you can do to develop your capabilities. Take a look below at some of the things you can do now to set yourself up for success in the future.

### Improver Innovator



- Think about how you approach studying – you're likely to have used the same techniques for a long time. Challenge yourself to think if this is still the best way of doing it, or are there some other techniques you could use that would better suit the way you learn?
- Pick a new (to you) aspect of technology to learn about, for example: create a blog or vlog post, learn some coding, find out and use two aspects of your mobile phone's functionality that you didn't use before, use a new app, learn some shortcut keys in Word or write a macro in Excel – the possibilities are endless!

### Critical Thinker



- Talk to as wide a range of people as possible about a problem you are facing to get a variety of different perspectives and ideas on what you could do. Draw on their experiences to reach a solution.
- When you're trying to solve a problem, think through the pros and cons. It might help you to make a list of these to help you figure out the best decision.



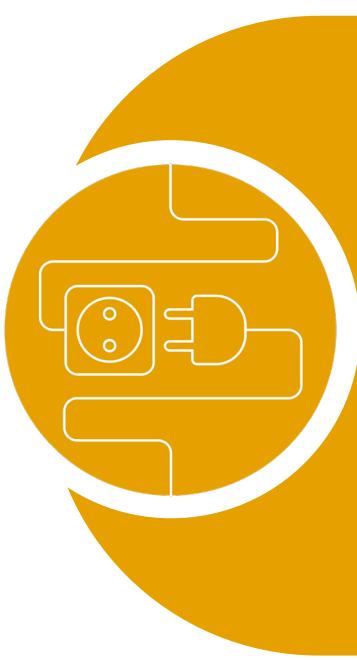
## Change Ready

- Ask trusted friends or teachers for feedback on how well you respond when things go wrong. What do they see you doing that works well or less well? What can you do to improve your response?
- When have you taken the opportunity to learn something new? What did you enjoy about it? Could you share this with others?



## Trusted Advisor

- Think about the relationships you have with others. How can you show compassion and empathy to continue to build strong and long-lasting relationships?
- Things don't always go right, or how we planned, but that's ok. What's important is to take responsibility and make sure you do the right thing. Think about a time when you could have taken more ownership of a problem. What would you have needed to do differently? What would the outcome have been?



## Connected

- When working with others, challenge yourself to ask open questions (ones that require more than one-word answers) to make sure you listen carefully to what others say and take on board their feedback.
- Make a short video of yourself putting a point across and watch it back:
  - How clear were your points?
  - What was your energy level like?
  - If you turned the sound off, would your body language and facial expressions support what you were trying to get across?
- For your next project, can you think about a new team member you could bring on board that might bring some new ideas or a fresh approach?

**Did you know there are lots of different jobs in financial services where your capabilities will help you shine?**

				
Digital Experience Manager Software Developer	Data Scientist Green Finance Specialist Voice Networks Specialist Cyber Security Manager	Web Technologist Technology Security Analyst Change Manager Colleague Experience Consultant	Digital Relationship Manager Sustainability Lead Customer Support Specialist Partnerships Lead	HR Advisor Agile Coach Social Media Manager Performance Consultant

**You can explore your potential career in financial services through a number of pathways – you just need the CareerSense to get started!**

Direct employment	Apprenticeship	Internship	Graduate
Apply for vacancies directly at the business once you leave school.	Combine on-the-job learning with studying for qualifications. Level 2 to Level 7 apprenticeships are available.	During your university study, you can apply for a paid summer experience giving you a flavour of what working at the business is like.	Once you've achieved a degree, you can apply for a two- or three-year graduate programme made up of a rotation of six-month placements in different areas of the business

**Well done for completing the tasks. Don't forget to have this completed Workbook handy when you have the Regroup session with your teacher.**

**If you're interested in finding out more about careers in finance, and some of the roles like those you've discovered today, take a look here:**