

INDIVIDUAL LEARNING PLAN

Level 3 Financial Services Customer Adviser

Including Professional Bankers Certificate | Standardised example template

Important: This is an example learning plan and does not contain confirmed delivery dates. Specific dates, joining links, deadlines and any timetable changes will be provided through BPP's online learning platform, the Hub. Session times and durations below are indicative and are based on the supplied programme plan.

Programme at a glance

Programme structure	Induction, 5 learning modules, Gateway and end-point assessment
Professional qualification	Professional Bankers Certificate
Module deadlines	Indicative: Weeks 12, 22, 32, 44 and 52
EPA period	12 weeks, with an indicative programme deadline of Week 64

Indicative live sessions and milestones

Programme stages replace specific calendar dates. Confirmed scheduling will be available in the Hub.

Stage	Session or milestone	Example time	Length	Type
Induction	Learner Programme Induction	14:00-16:00	2 hrs	Webinar
Induction	Growth Mindset Quiz	Flexible	Self-paced	Deadline
Induction	Start Point Self-Assessment	Flexible	Self-paced	Assessment
Module 1	Introduction to Personal Development	11:30-13:00	1 hr 30	Webinar
Module 1	Prevent & British Values training	Flexible	Self-paced	Deadline
Module 1	Personal Development Plan submission	Flexible	Self-paced	Submission
Module 1	Unit 1 - Banks & Banking PBC session	13:00-15:00	2 hrs	Webinar
Module 1	Unit 1 PBC revision session	13:00-14:00	1 hr	Webinar
Module 1	Module 1 submission	Flexible	Self-paced	Submission
Module 1	Data Fundamentals & Digital Awareness	11:30-13:00	1 hr 30	Masterclass
Module 2	Unit 2 - Responsible & Sustainable Banking PBC	13:00-15:00	2 hrs	Webinar

Stage	Session or milestone	Example time	Length	Type
Module 2	Unit 2 PBC revision session	13:00-14:00	1 hr	Webinar
Module 2	Exam Prep & Revision Tools	14:00-15:00	1 hr	Webinar
Module 2	Collaboration, Systems & Processes	12:00-13:30	1 hr 30	Webinar
Module 2	Stakeholder Management	10:00-11:30	1 hr 30	Masterclass
Module 2	Module 2 submission	Flexible	Self-paced	Submission
Module 3	Unit 3 - Bank Customers PBC session	13:00-15:00	2 hrs	Webinar
Module 3	Unit 3 PBC revision session	13:00-14:00	1 hr	Webinar
Module 3	Communication & Customer Relationship Management	10:00-11:30	1 hr 30	Webinar
Module 3	Unit 4 - Customer Experience PBC session	13:00-15:00	2 hrs	Webinar
Module 3	Mid-Point Self-Assessment	Flexible	Self-paced	Assessment
Module 3	Unit 4 PBC revision session	14:00-15:00	1 hr	Webinar
Module 3	Module 3 submission	Flexible	Self-paced	Submission
Module 4	Book PBC exam after final revision	Flexible	Self-paced	Milestone
Module 4	Unit 5 - Financial Regulation PBC session	13:00-15:00	2 hrs	Webinar
Module 4	Unit 6 - Professional & Ethical Banking PBC	13:00-15:00	2 hrs	Webinar
Module 4	PBC all-units revision session	13:00-15:00	2 hrs	Webinar
Module 4	Professionalism & Applying Regulation	10:00-11:30	1 hr 30	Webinar
Module 4	Sit PBC exam	Flexible	Self-paced	Deadline
Module 4	Module 4 submission	Flexible	Self-paced	Submission
Module 4	Working Alongside AI	14:00-15:30	1 hr 30	Masterclass
Module 5	Gateway & End Point Assessment Overview	14:00-15:30	1 hr 30	Webinar
Module 5	Continuous Improvement	10:00-11:30	1 hr 30	Webinar
Module 5	Problem Solving & Resilience	10:00-11:30	1 hr 30	Webinar
Module 5	Personal Development Part 2	10:00-11:30	1 hr 30	Webinar
Module 5	Module 5 submission	Flexible	Self-paced	Submission
Post-learning	End Point Self-Assessment	Flexible	Self-paced	Assessment
Post-learning	Gateway Review	To be confirmed	To be confirmed	Gateway

Learning activities and module structure

Programme Induction

Development time: 3 hours | Duration: 2 weeks

- Programme induction and Hub familiarisation
- Growth Mindset, Prevent, British Values and self-assessment activity
- Welcome call with BPP Banking Coach and line manager

Module 1: Industry & Company Understanding

Development time: 50 hours | Duration: 10 weeks | Deadline: Week 12

- Personal Development learning and PDP submission
- Unit 1 PBC study, live session and revision
- Data Fundamentals & Digital Awareness Masterclass

Module 2: Collaboration, Systems & Processes

Development time: 50 hours | Duration: 10 weeks | Deadline: Week 22

- Unit 2 PBC study, live session and revision
- Exam Prep & Revision Tools
- Collaboration, Systems & Processes learning
- Stakeholder Management Masterclass

Module 3: The Customer Experience

Development time: 50 hours | Duration: 10 weeks | Deadline: Week 32

- Units 3 and 4 PBC learning, live sessions and revision
- Communication & Customer Relationship Management
- Mid-point self-assessment and PBC exam booking

Module 4: Financial Regulation & Professionalism

Development time: 50 hours | Duration: 12 weeks | Deadline: Week 44

- Units 5 and 6 PBC learning and live sessions
- All-units revision, mock exam and PBC examination
- Professionalism & Applying Regulation
- Working Alongside AI Masterclass

Module 5: Problem Solving & Innovation

Development time: 50 hours | Duration: 8 weeks | Deadline: Week 52

- Gateway and EPA overview
- Continuous Improvement
- Problem Solving & Resilience
- Personal Development Part 2

Using the Hub

The Hub is BPP's online learning environment. Learners should use it for programme information, learning resources, live-session links, recordings and confirmed deadlines. The Hub remains the definitive source where information differs from this example plan.

Completion, Gateway and end-point assessment

- Complete and pass each module and the PBC examination.
- Attend the Gateway Review with the coach and line manager.
- Submit a portfolio of evidence and complete a professional discussion.
- EPA grading is pass or distinction.
- The supplied plan states that the EPA assessment plan was under review and due for release in July 2026.