

## INDIVIDUAL LEARNING PLAN

# Level 6 Financial Services Professional

## CBI Diploma in Lending Skills | 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 | 4 learning modules followed by Gateway and end-point assessment preparation     |
| Development time    | 6 hours per week                                                                |
| Module deadlines    | Indicative: Weeks 16, 35, 50 and 72                                             |
| EPA period          | Approximately 6 months, subject to Gateway readiness and confirmed arrangements |

### Indicative live sessions and milestones

Programme months are indicative and replace specific calendar dates. Confirmed scheduling will be available in the Hub.

| Stage       | Session or milestone                             | Example time | Length     | Type           |
|-------------|--------------------------------------------------|--------------|------------|----------------|
| Month 1     | Learner Induction Webinar                        | 10:00-11:30  | 1 hr 30    | Webinar        |
| Month 1     | FDOL Quiz                                        | Flexible     | Self-paced | Deadline       |
| Month 1     | Knowledge, Skills and Behaviours Webinar         | 10:00-11:30  | 1 hr 30    | Webinar        |
| Month 1     | Start Point Self-Assessment                      | Flexible     | Self-paced | Assessment     |
| Month 1     | Joint CBI / BPP Webinar                          | 10:00-11:00  | 1 hr       | Webinar        |
| Month 1     | Diploma in Lending Skills Webinar 01             | 10:00-13:00  | 3 hrs      | Webinar        |
| Month 2     | Diploma in Lending Skills Webinar 02             | 10:00-13:00  | 3 hrs      | Webinar        |
| Month 2     | Diploma in Lending Skills Webinar 03             | 10:00-13:00  | 3 hrs      | Webinar        |
| Month 4     | Diploma in Lending Skills MCQ                    | Flexible     | Self-paced | Deadline       |
| Month 4     | Coaching Session                                 | 10:00-11:00  | 1 hr       | Coaching       |
| Month 5     | Emotional Intelligence Masterclass               | 13:00-15:00  | 2 hrs      | Masterclass    |
| Month 5     | Prevent Module                                   | Flexible     | Self-paced | Deadline       |
| Month 5     | Diploma in Lending Skills Assignment             | Flexible     | Self-paced | Deadline       |
| Month 6     | ESG & External Environment Masterclass           | 10:00-12:00  | 2 hrs      | Masterclass    |
| Month 6     | Risk and Governance Masterclass                  | 10:00-12:00  | 2 hrs      | Masterclass    |
| Month 7     | Financial Services Governance Assignment         | Flexible     | Self-paced | Deadline       |
| Month 7     | Relationship & Advice Management Masterclass     | 09:30-11:30  | 2 hrs      | Masterclass    |
| Month 8     | Clients and Customers Assignment                 | Flexible     | Self-paced | Deadline       |
| Month 8     | PBC Webinars 01-05                               | 10:00-12:00  | 2 hrs each | Webinar series |
| Month 9     | PBC submission                                   | Flexible     | Self-paced | Deadline       |
| Month 9     | Working with AI & Technology Masterclass         | 10:00-12:00  | 2 hrs      | Masterclass    |
| Months 9-10 | Digital & AI Evolution in Banking Webinars 01-05 | 10:00-12:00  | 2 hrs each | Webinar series |
| Month 10    | Mid-Point Self-Assessment                        | Flexible     | Self-paced | Assessment     |

|               |                                                       |                 |                  |             |
|---------------|-------------------------------------------------------|-----------------|------------------|-------------|
| Month 11      | Cyber Security Masterclass                            | 10:00-12:00     | 2 hrs            | Masterclass |
| Month 13      | Financial Services Industry Assignment                | Flexible        | Self-paced       | Deadline    |
| Month 14      | EPA Prep - Project Management Masterclass             | 11:00-13:00     | 2 hrs            | Masterclass |
| Month 16      | Strategic Thinking and Leadership Masterclass         | 10:00-12:00     | 2 hrs            | Masterclass |
| Month 16      | EPA Prep - Project Report Writing Masterclass         | 10:00-12:00     | 2 hrs            | Masterclass |
| Month 17      | Growth Mindset Masterclass                            | 11:00-13:00     | 2 hrs            | Masterclass |
| Month 17      | Strategic Planning Assignment                         | Flexible        | Self-paced       | Deadline    |
| Month 18      | Professional Discussion and End Point Self-Assessment | Flexible        | Self-paced       | Assessment  |
| Post-learning | Gateway and EPA preparation                           | To be confirmed | Approx. 6 months | EPA         |

## Learning activities and module structure

### Module 1

**Development time: 6 hours per week | Deadline: Week 16**

- Diploma in Lending Skills learning and assessment
- Core induction, KSB and early programme activity

### Module 2

**Development time: 6 hours per week | Deadline: Week 35**

- Financial services governance, clients and customers
- PBC learning and assessment activity

### Module 3

**Development time: 6 hours per week | Deadline: Week 50**

- Digital, AI, innovation, fintech and cyber security learning
- Financial Services Industry assignment

### Module 4

**Development time: 6 hours per week | Deadline: Week 72**

- Strategic thinking, leadership and growth mindset
- Strategic Planning assignment and professional discussion preparation

## 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

- Review and become familiar with the EPA toolkit.
- At Gateway, readiness is agreed with the BPP Coach and Line Manager.
- EPA methods shown in the supplied plan are Portfolio, Project and Interview.