

INDIVIDUAL LEARNING PLAN

Providing Financial Services

SCQF Level 6 | PBC and Masterclasses | Standardised example template

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

Programme at a glance

Programme elements	Professional Bankers Certificate, Masterclasses, workplace activities and Meta-skills
Workplace assessment	11 stated activities across customer service, documentation, complaints, continuous improvement and professional relationships
Review pattern	Six-weekly telephone reviews and SDS reviews shown in the supplied plan
Completion stage	Outstanding actions, final verification and certification

Indicative live sessions and milestones

The supplied plan gives session start times and durations rather than finish times. These have been retained without estimating finish times.

Stage	Session or milestone	Example time	Length	Type
Module 1	Unit 1 PBC session	13:00	2 hrs	Webinar
Module 1	Unit 1 PBC revision	13:00	1 hr	Webinar
Module 1	Data Fundamentals & Digital Awareness	13:00	1 hr 30	Masterclass
Module 2	Unit 2 PBC session	13:00	2 hrs	Webinar
Module 2	Unit 2 PBC revision	13:00	1 hr	Webinar
Module 2	Stakeholder Management	13:00	1 hr 30	Masterclass
Module 3	Unit 3 PBC session	12:00	2 hrs	Webinar
Module 3	Unit 3 PBC revision	13:00	1 hr	Webinar
Module 3	Unit 4 PBC session	13:00	2 hrs	Webinar

Stage	Session or milestone	Example time	Length	Type
Module 3	Book PBC exam	Flexible	Self-paced	Milestone
Module 3	Unit 4 PBC revision	13:00	1 hr	Webinar
Module 4	Unit 5 PBC session	13:00	2 hrs	Webinar
Module 4	Unit 6 PBC session	13:00	2 hrs	Webinar
Module 4	PBC all-units revision	13:00	2 hrs	Webinar
Module 4	Working Alongside AI	13:00	1 hr 30	Masterclass
Post-learning	Sit PBC exam	Flexible	Self-paced	Deadline
Post-learning	PBC resit, if required	Flexible	Self-paced	Deadline

Learning activities and module structure

Professional qualification: PBC

Units 1-6 plus revision and examination

- Pre-session study through the Hub and CBI site
- Live PBC sessions and revision sessions
- Knowledge-check questions and post-session study
- Book and sit the PBC examination, with resit if required

Certificate of Customer Service in a Financial Services Environment

11 workplace activities

- Support Continuous Improvement in the Financial Services Sector
- Provide Customer Service
- Process and Provide Financial Documentation
- Identify and Process Customer Complaints
- Develop Professional Relationships through Collaboration

Meta-skills

Development throughout the programme

- Introduction and self-assessment
- Set goals and maintain the Meta-skills Development Log
- Submit the log one week before each SDS Review
- Complete reflective professional discussions during reviews

Contact and reviews

Programme contact pattern

- Induction and paperwork
- Six-weekly telephone reviews
- SDS Reviews

Example learning plan | Confirmed dates and joining details are provided in the Hub

- Final reflective professional discussion and self-assessment

Using the Hub

The Hub is BPP's online learning environment and the definitive source for programme information, learning resources, live-session links, recordings and confirmed deadlines.

Completion and certification

- Share the PBC certificate with the assessor.
- Complete all outstanding actions and activities.
- Complete final verification and certification.