

Is your business equipped with the correct tools for CPD and SPS?

Minimise the risks to your business with the Insight CPD Portal



All Retail Investment Advisers must hold a current SPS in order to provide advice. Each adviser is required to create a CPD plan, which identifies specific learning objectives and how the adviser intends to meet these objectives, including what activities they intend to carry out. All advisers require an efficient CPD and SPS process that provides guidance, direction and manages the risk with low costs.

The Insight CPD Portal provides advisers with an intuitive and simple to use 'one stop shop' for all their CPD planning and SPS management requirements. The portal provides CPD guidance on relevant activities and prescription (if required) to help advisers take the guess work out of building their own CPD Plan. The CPD portal provides access to an E-Market where a growing community of activities and content are being developed in conjunction with industry partners allowing advisers to benefit from discounted content.

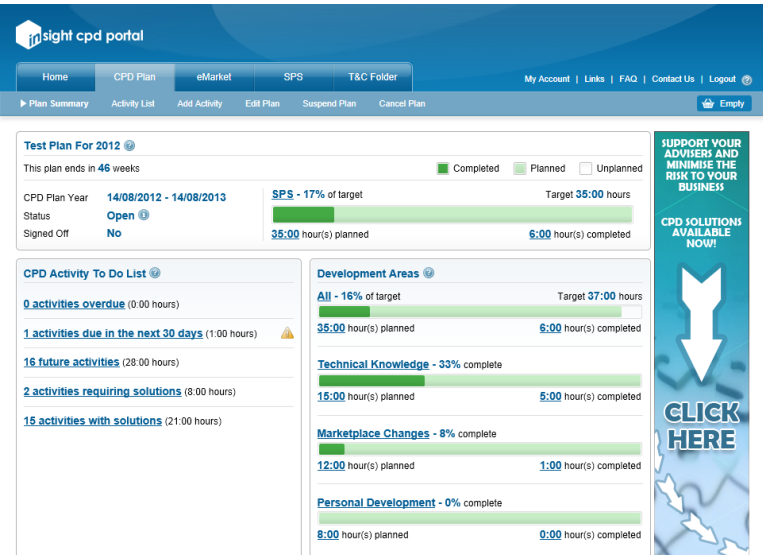
In addition, Redland's Insight platform provides a comprehensive CPD Management capability, supporting sponsors and managers within an organisation to obtain an over arching view of the CPD activity carried out by its advisers.

The underlying CPD Portal data can also be examined for an individual via the 'Progress Indicator dashboard' which provides a breakdown of an individual's CPD plan, and highlights the number of hours currently planned, any shortfall in their planning together with how many hours have been completed to date.

CPD Management also provides comprehensive MI via dashboards which can be used to examine and identify trends and risks in relation to CPD and the ongoing competence of Advisers. The dashboards can identify individuals and teams without CPD Plans, those who are overdue in their completion of activity and those who are nearing SPS expiry. Notifications can also be used to alert the individual as to any action required such as updating their CPD Plan.



Powered by the Insight CPD Portal as used by over 4,000 Advisers with free subscription. Access to a wide range of CPD solutions from a centralised extensive e-marketplace, with solutions from technical experts, Taxbriefs, linked directly to Level 4 APEX standards.



The screenshot shows the 'insight cpd portal' interface. At the top, there are navigation tabs: Home, CPD Plan, eMarket, SPS, and T&C Folder. Below this is a sub-navigation bar with options like Plan Summary, Activity List, Add Activity, Edit Plan, Suspend Plan, and Cancel Plan. The main content area displays a 'Test Plan For 2012' with a progress bar for SPS at 17% of target (35:00 hours planned, 6:00 hours completed). It also shows a 'CPD Activity To Do List' with 0 activities overdue, 1 activity due in the next 30 days, 16 future activities, 2 activities requiring solutions, and 15 activities with solutions. A 'Development Areas' section shows progress for All (16% of target), Technical Knowledge (33% complete), Marketplace Changes (8% complete), and Personal Development (0% complete). A sidebar on the right contains a call to action: 'SUPPORT YOUR ADVISERS AND MINIMISE THE RISK TO YOUR BUSINESS' with a 'CLICK HERE' button.

Key Benefits

Branded for your community

Structured CPD Plan creation supported by tailored templates, to provide guidance and/or prescription

Intuitive and easy to use

Manage application and renewal of SPS

Access a whole programme or individual activities

Automatically logged activity with pre populated learning objectives and relevance to role

Personal CPD Plan with appropriate actions linked to TC Scheme activities

CPD oversight capability with interactive dashboards with consolidated views of CPD across your business

CPD notifications allow management to communicate with the entire community, selected groups or individuals