

## Are you in control of your Firms CPD responsibilities?

Have the answers at your fingertips with Insight CPD Management



Insight CPD Management is a complementary product to Redland's Insight CPD Portal and provides supervisors with an over-arching view of the CPD activity carried out by their advisers.

Using CPD Management, all levels of the organisation gain visibility of CPD activity across the business. This can be focused on an individual adviser, across a span of control or a based on a specific firm as required. This analysis is based on CPD plans and activities which have been created by the advisers themselves through the Insight CPD portal.

CPD Management can also interrogate the SPS records held by the business to determine when they are expiring and if new SPS certificates have been applied for in a timely way. In addition, trends and issues can be identified across the adviser community with the ability to send notifications to individual advisers or groups to update or check on CPD activity.

CPD Management is aimed at organisations who have already started to benefit from Redland's Insight CPD Portal product either from use of the 'Adviser Home CPD Centre', which has the CPD Portal as its platform, or from their own in-house customised and branded version.

CPD Management also provides optional central control over CPD planning and SPS processing. CPD Management ensures that supervisors can if required set up CPD Plans, create pre-defined templated activities for their teams and apply for future SPS certificates ahead of their current expiry. The system also provides supervisors with the ability to review advisers activity and their CPD Plans throughout the year and prior to the Plan being closed at the end of their CPD year. The supervisor can then check that the required structured hours are completed and that the CPD records are of the required quality and completeness.

CPD Management provides a CPD Plan Progress Summary which the supervisor can use to highlight shortfalls in planned and completed activity. 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 to any action required such as updating their CPD Plan.

Coupled with the Insight CPD Portal, CPD Management provides a 'Top Down' view of the CPD activity being carried out by your advisers, and informs you of how well your business is conforming to the RDR requirements surrounding the planning and completion of relevant CPD, and associated granting of SPS certificates.

Existing firms and advisers already using the Redland CPD Centre can benefit from using CPD Management with no additional work.

### Key Features

Managers and supervisors have a consolidated view of CPD activity and SPS status across the organisation

Interactive MI dashboards provide the ability to filter, view and report on the consolidated data based on business units or groupings within the adviser community

Notifications allow management to communicate with the entire community, selected groups or individuals from a central control point

Manage status, application and renewal of SPS

Supervisor review of CPD plans prior to SPS renewal request

Seamlessly integrates with Insight Competency Testing and T&C Management

### Key Benefits

Identify trends, issues, actions required and proactively manage remedial action

Centralised management and visibility of all CPD and SPS related activity

Significantly reduce risk and workload associated with monitoring CPD activity within the organisation

Improve the quality of the visibility and aggregation of CPD and SPS related data across the organisation

Efficiently combine existing T&C scheme controls and CPD requirements into a single supervisory framework

Communicate with advisers in a controlled and audited manner to ensure CPD activity and SPS renewal is being managed within governance parameters