



insight training and competence learning and development

overview

At the heart of Redland's Insight Training and Competence system is the Learning and Development module. This module is designed to help everyone in an organisation from the advisers and supervisors to the principal, to design and monitor effective learning and development plans.

attaining and developing competency

In this section, the organisation will develop a series of 'Learning and Development Tracks' they believe are suitable for one or more of their employees including advisers and supervisors. These tracks will involve a number of different activities, such as courses, tests or assessments and meetings, that a person must undertake before that 'track' is deemed complete.

Once created the tracks will be available to the advisers and their supervisors to allocate to their personal 'event list'. This 'event list' is in effect a 'to do' list tailored to each user, which is also available to everyone in the appropriate position within the hierarchy in the organisation. A rolling view of the Event list is presented giving sight of all activities within an agreed number of days ahead. The 'event list' ensures all parties are aware of tasks and actions and helps monitor progress.

Once a learning or development track is completed the appropriate qualifications or licences can be granted and the future online refresher tests will be scheduled in the diary.

a product from



supervision

Insight is a powerful Supervisory tool allowing the supervisor to:

- View and manage supervisory tasks
- Review all advisers within their span of control
- Review an event list of all tasks for their span of control
- Have a calendar view of all actions

All supervisory activities or actions past their due date are highlighted in red to indicate a 'breach' of the scheme rules. In this way Insight helps ensure the supervisor is aware of all outstanding tasks and can be proactive in supporting their advisers through the learning and development process.

action plans

Insight helps the creation of action plans for any user. These plans start detailing the development objective, including the reason for the objective. Actions can then be created (these may include the learning and development tracks) and target dates are applied. In effect the action plans become a personal development plan that will guide the adviser to their next levels of competence and beyond.

CPD monitoring

Insight schedules and logs CPD activity. A set number of CPD points are allocated for each year and as individuals complete each activity the CPD points are collated. Associated activities are agreed with the supervisor as part of a 'forward looking' approach to CPD. At any point the user can then see how many points they have 'earned' and how many more they still need.

Individual levels of competence, qualifications and licences are recorded and tracked in the system, upgrading them as learning and development tracks are completed.

benefits

Insight ensures that effective learning and development plans are built, maintained and monitored. In doing so it helps:

- Maximise the potential of the advisers
- Help advisers monitor and adhere to their development goals
- Help develop advisers to meet the increasing professional standards demanded in today's industry, particularly those proposed by the RDR
- Increase the potential span of control for the supervisors
- Keep a consistent approach to training and competence across all advisers and all supervisors
- Keep an audit trail of the training and competence plans
- Demonstrate to the FSA the seriousness that the organisation is placing on Training and Competence

In effect Insight Training and Competence embodies the rules of the Training and Competence scheme ensuring a consistent manageable and auditable approach to Training and Competence.