Case Study
Training Resources Department Placement

The Training Resources department at Personal Touch is a financial adviser's first point of contact for their training needs and queries. They are unique in that the output is measured on adviser training; however this takes substantial background planning and research. An industry requirement is that advisors and staff are appropriately trained and knowledgable in their job role; consequently for Training Resources this means that there is an encouragement to study for the industry qualifications and there must be an ongoing review of training material in order to keep up to date with changes in the FSA (Financial Services Authority) regulation. Team members must actively control their schedule-prioritising effectively is essential.

In addition to Training Resources needing to keep up to date on industry regulations, there is also the need to convey the information in ways which are engaging to the advisers, in order to maximise their learning experiences. The mediums of communication PTFS use include face-to-face on training courses, video braodcasts, demonstration videos and web based seminars. All new advisers are required to partake in an induction course, however the courses offered span to areas embracing Sales Techniques, Supervision and for the different product areas, which include Private Health Insurance and Investments.

Training Resources was my fifth department at Personal Touch, and at the time of joining the department, I had already passed exams in 'UK financial services, regulation and ethics' (CF1), 'Financial Protection' (CF3) and (CF6) 'Mortgage Advice'. From the time I spent in other departments, I gained a knowledge of our back office system, 'Toolbox', and built up good relations with our advisers. These formed the basis of my work within the department and allowed me to take on projects to train advisers in areas related to my previous achievements.

I began my placement with Training Resources by assisiting a staff induction course. A combination of being in the company 9 months and passing my exam related to the Financial Services regulations, enabled me to coach the new starters on company and industry policies and guidelines. The staff induction is also a good opportunity to get to know the new recruits and practice your own presentation technique.

My main project within the team was designing demonstration videos for the adviser in order to assist them in using our back office system. These videos included adding a clients information and a sale to the system. The project was to form a part of the redevelopment of our online Training Centre. Once I had been shown how to use the computer programme which these videos are designed on, I worked independently on the project, with support from the other members of the team when required. Training Resources provides you with the opportunity to gain a working knowledge of programmes that other departments within the company seldom use, however are invaluable to advisers. It is very rewarding to see a project evolve from research to full implementation and Training Resources provides the support and chance for this to happen.

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