

## Continuing Professional Development Plan

Name: M. Y. Development	CIOBS Membership No: 12345678	CPD Year: 20XX
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Category	Learning Objective	Activity	Learning Outcome/ Result	Start Date	End Date	Hours
Professionalism & Ethics	<i>In view of the intensified interest of financial regulators and customers on Professionalism &amp; Ethics, I want to gain an understanding of the key principles involved to improve my knowledge. This will help me put into context some of the wider issues affecting customers, staff, employers and shareholders.</i>	<i>Complete the Professionalism &amp; Ethics training available through CIOBS [or through Employer in-house courses].</i>	<i>Obtained a much better appreciation of the key principles of ethics and learned from the real life case studies. I am better prepared to identify and deal with potential ethics related situations in the future.</i>	1/2/XX	30/3/XX	5.0
Technical Skills	<i>Improve technical knowledge and gain a wider perspective of Anti- Money Laundering. This will assist me in my day to day activities by giving me some form of benchmarking against other financial services organisations.</i>	<i>Attend CIOBS Scottish Banking Forum on Anti Money Laundering presented by PWC.</i>	<i>Awareness of Anti Money Laundering issues improved. Used my newly gained knowledge to help develop new monitoring exception reports aimed at identifying unusual customer behaviour.</i>	1/9/XX	31/5/XX	1.5
Management and Leadership Skills	<i>Ensure that I am aware of and up to date with relevant events and current market conditions in the retail sector. This will help me in my day to day role and will ultimately have business benefits also.</i>	<i>Read Financial Times, BBC Business News website, intranet from key Group Departments, Chartered Banker magazine and financial press in general.</i>	<i>Used topical information as part of my update to my team and was able to provide current examples from the recent financial press. Reaction from team was better than usual.</i>	1/1/XX	31/12/XX	6.0
Management and Leadership Skills	<i>Gain experience of how others manage people and see the implementation of different techniques and behaviours from an existing practitioner. This will help me to develop an understanding of some of the key skills required as I want to apply for a role which involves the management of staff and I have no experience in this area.</i>	<i>Arrange a session with my line manager to shadow another manager for a morning to see how they deal with staff issues and meetings.</i>	<i>Gained confidence in my ability to undertake a line management role.  Applied for a temporary secondment within my existing department to gain line management experience in a safe learning environment.</i>	1/6/XX	30/6/XX	3.5
Management and Leadership Skills	<i>Improve Coaching techniques so that I can pass on best practice and new techniques to members of my team.</i>	<i>Attend in- house Coaching session run by external provider for all of management team.</i>	<i>New knowledge passed onto my direct reports as part of an in- house training session to improve motivation in sales team. Sales performance up by 10%.</i>	7/9/XX	7/11/XX	7.0
Communication Skills	<i>Develop ability to deliver presentations with confidence and conviction to groups of people as I have minimal experience of public speaking. This will prepare me for a key part of my role in the future.</i>	<i>Participate in the CIOBS Financial Education Partnership [FEP] to share my knowledge of finance with school pupils.</i>	<i>After only 3 FEP sessions, I have gained sufficient confidence to overcome my fear of public speaking. I have volunteered to run a session at our next management awayday.</i>	15/4/XX	31/7/XX	6.0
Community/ Voluntary Activities	<i>Use existing business skills and adapt them to suit a different set of circumstances in a new environment. This will help to broaden my overall breadth of experience.</i>	<i>Participate in the project team of an initiative to refurbish a local community centre.</i>	<i>Gained experience in applying my finance knowledge to a new project. Delivered within budget. Also improved my technical knowledge.</i>	15/6/XX	31/8/XX	6.0
<i>Total</i>						35.0

I declare that this is a true and accurate record of my CPD activity.

Signed: M.Y. Development

Date: 9/01/XX

Please retain a copy if you need to send your completed plan to CIOBS as part of a sample for monitoring purposes.