Sample Curriculum Vitae

Skills.

Needs analysis skills
Identification of skills gap for a Call Centre team tasked with generating leads from inbound enquiries. Result: A series of modules client specific on questioning and need identification skills.

Facilitation skills.
Executive coaching to identify corporate values for the organisation linked to strategy and market presence.

Project management skills.
Project management for design and delivery of training to extend the license of mortgage advisers to sell non regulated protection.

Communication and delivery skills.
Delivery of courses and seminars. On a panel of advisers at the Money Show at Olympia.

Assessment skills.
Assessment of advisers and supervisors to sell compliantly within FSA and Company compliance standards.

Career.

1975 to 1989	Midland Bank Trust Company. Auditor; Assistant Accountant; Trust Officer; Portfolio Manager. Including 6 years in offshore banking.
1989 to 1995	Skipton Financial Services Limited. Independent Financial Adviser; Head of Training Services; Development Manager.
1995 to 1999	Hogg Robinson Financial Services Ltd. Independent Financial Adviser.
1995 to Date	Running training consultancy with own client base and as a freelance associate.

Recent Projects

General Insurance Regulation for Mortgage Sellers
Project management of the design and delivery and implementation of distance learning material and assessment processes for all delivery channels, Telephony, Branch and High Net Worth in preparation for General Insurance regulation. Client: Barclays Bank.
Mortgage Regulation
Delivery of Mortgage Regulation training to mortgage advisers. Client: Lloyds TSB Plc and Cheltenham and Gloucester

Mortgage regulation.
Need identification of training gap and design of Supervisor training course and assessment event for Mortgage Supervisors in preparation for CP186 (Mortgage regulation). **Client: Barclays Bank.**

Conversion of tied salesforce to independent advisers.
Consultant assisting with the implementation of switching the organisation from tied advice to independent, with particular focus on the IFA software. Design of manuals and modules for new IFA software, including new fact find process and mid interview activity tools such as exweb. Training design for the technical aspects of switching roles from tied to independent. In particular the impact on product selection. **Client: Norwich and Peterborough Building Society.**

Past Projects.

Regulatory training.
Member of a project team for the design of re-training and assessment material to re licence a direct sales force. Deliverer of the pilot event to test the material. Centre manager for the roll out of the training, which involved responsibility for 70 plus trainers, assessors and delegates. **Client: Royal London**

Sales training.
Need analysis, design and implementation of sales skills training for regulated and non regulated sales forces and call centre staff. **Clients: Royal and Sun Alliance; London and Manchester; Britannic Assurance; Skipton Building Society; Standard Life; Bradford and Bingley**

Management training.
Design and delivery of management skills training. Skills training areas include: communication skills; coaching skills; counselling skills; strategic planning; managing change; managing conflict; assessment skills; supervisory skills. **Clients: Homeloan Management Ltd; Save and Prosper; Chelsea Building Society; PPP Lifetime; Britannic Assurance; Barclays Bank; Charles Schwab.**

Call centre training.
Design and delivery of call centre skills, knowledge and attitude training to both existing businesses and start up operations. Knowledge training regarding products and computer support systems, skills training on both outbound and inbound calls and attitude training on organisational values. **Clients: Prudential Bank; AMP Bank; On Digital; Royal and Sun Alliance; Homeloan Management Ltd; Yorkshire Electricity; Tesco Storecard; Merrill Lynch HSBC.**

Financial service technical training.
Delivery of revision courses for CeFA1, 2 and 3 and personal coaching prior to exams.
Client: Barclays Bank.

Qualifications.

Advanced Financial Planning Certificate, two papers attained.
(Taxation and Trusts and Personal Financial Planning)
Financial Planning Certificate
CeMap
Foundation Insurance Test
Associate of Chartered Institute of Bankers (Trustee Diploma).
Certificate in Pre-Retirement Education and Planning - 2 modules towards a M.Ed. with the University of Surrey.
Assessed at NVQ level 4 for Training presentation skills