How can you develop talent and build capability that drives value in the business?

See how our flexible learning programmes for customer professionals have become a benchmark of excellence: developing talent, closing skills gaps and creating the capacity to deliver change. Meet your requirements with our suite of training modules, qualifications, specialist workshops, on-demand learning and on-site support.

“If we bring in the right talent, could we step up a gear? We need people to start off new thinking, keep everyone moving on, release the potential in others. If you don’t have investment, you lose momentum.”

Emma Botfield  
Head of Customer Service UK & Northern Europe, Rs Components

“When you collaborate you share knowledge because you’ve got a sense of trust... because you are open, you develop a deeper understanding. This builds confidence that you can achieve something greater than was possible before, which increases trust further.”

Richard Brimble  
Author and consultant, formerly Director of Organisation and Development at Affinity Water

Sign up today or contact us for more information to discuss how this 12 month programme of support activity can help your team and function be fully effective in adding value to your business.
Developing talent & capability for your business or service

By challenging their thinking and applying new skills and knowledge, students build confidence and credibility, which are fundamental to their success. The wide range of options enables you to match your specific learning outcomes and calendar constraints for 2017.

**Personal Learning Pathways**
Convert your participation in conferences, site visits or the challenge into personal learning pathways by upgrading these programmes to Silver or Gold levels, offering learning support and accreditation from Ulster University Business School. By upgrading these programmes, participants gain fully supported learning and accreditation, giving you confidence in making the most of these opportunities for professional development.

- **Supported Learning (silver upgrade)** – Mentoring and peer review offer the benefits of experience from other organisations & sectors. Outputs include reports, presentations & benchmarking insights.
- **University Accreditation (gold upgrade)** – There is a tangible change in mindset and behaviour when training has academic depth and challenge and university qualifications carry a high motivational value.

**Knowledge and skills training workshops**
These one or two day workshops can close skills or knowledge gaps, support strategic change and build a common focus. By applying the learning, teams build confidence and credibility in key areas that are fundamental to success.

- They can be run on-site for you or by sharing the workshop across organisations in one region
- Workshops can be undertaken as part of a change project or a team/individual's development plan
- Workshop topics cover: Leadership, communication and influence, planning, resourcing, customer experience, quality, analytics & insight.
- Workshops are interactive learning experiences; preparation and follow up work may be required
- Supported or accredited learning pathways can be combined with workshops for maximum value

**Flexible Learning Programmes**
A vast range of learning opportunity is available by taking individual modules from our collaboration with Ulster University Business School. Focus on specific skills or knowledge gaps and establish a platform of study skills that can be built upon at a later date.

- Individual modules require time commitment over a shorter period, relate to a specific set of learning outcomes and introduce these learning opportunities at a lower cost per individual
- Most modules can be undertaken in your own time or at work, using digital content and skype-style tutorials. A few are workshop-based, requiring travel, and member events can be used for networking & engagement
- Programme topics cover both specialist skills that make you more effective in your current role and strategic stretch and challenge – opportunities from the BSc Honours year

**What members say about the benefits of our learning programmes**

- They open up roles to a wider pool of talent, because they are so relevant to the job. This retains knowledge and experience in the business
- The blend of academic and business approaches challenges thinking, so that students build the skills and confidence to contribute and add value at a higher or more strategic level in their organisation
- Teams involved in our learning programmes value the opportunities to research, analyse and learn from others outside their organisation or sector. You may think of this as like free consultancy!
- People feel valued when they see investment in them and know they are progressing. Benefits match investment, but this programme can be tailored to your needs and budget
Personal learning pathways for professional development

New for 2017: convert your participation in conferences, site visits or the challenge into personal learning pathways by upgrading these programmes to Silver or Gold levels, offering learning support and accreditation from Ulster University Business School.

New pathways for independent learning
These new dedicated learning pathways, open for enrolment from January 2017, support members who are already engaging in conferences, site visits or other best practice programmes and training workshops during the year.
- These events are no longer standalone activities; they become full professional development programmes, providing remarkable value for money and give a taste of the benefits from academic learning
- By upgrading these programmes, participants gain fully supported learning and accreditation, giving you confidence in making the most of these opportunities for professional development

Supported learning (silver upgrade)
- Mentoring groups offer networking/external perspectives and support from specialist experts
- Induction support helps students develop specific learning goals & outcomes to meet their needs
- Focussed online resources (eg video and digital downloads) can be linked to these learning outcomes and provide access to best practice & benchmarking materials
- Online collaboration means students need never be on their own. This includes skype-style group meetings, online discussion groups and individual conversations, buddying or mentoring support
- Advice or support is available for students with particular individual needs or challenges

University Accreditation (gold upgrade)
- Accredited by Ulster University Business School, through the project, benchmarking or independent learning modules in the BSc programme.
- Students create reports, presentations and propose application of new ideas in their workplace
- Blending the best of academic and business worlds
- This includes work that needs to be undertaken in their own time or in ring-fenced study time
- Extra support includes group tutorials at the start and end of these learning journeys
- Assessment links directly to the learning outcomes, the central aspects of what is learnt, and emphasises the development of deep, active reflective learning and the transfer of skills.

Personal development through teamwork projects
- Team projects provide a great context for professional development. For example, we encourage those taking part in the Standards Benchmarking or Challenge programme to see these as opportunities for personal learning and development as well
- While university accreditation applies to individuals, these new pathways make it possible for students working on a team project, such as the challenge, to gain accreditation personally

Learning opportunities that blend the best of academic and business worlds
Experience from students on our university partnership programmes demonstrates that:
- There is a tangible change in mindset & behaviour when training has academic depth and challenge
- University qualifications and credit points carry a high motivational value and deepen personal commitment, more than outweighing some additional costs
- Mentoring and peer review offer the benefits of experience from other organisations & sectors
- Programme outputs include: reports, presentations, critical analysis and development plans
Knowledge & skills training workshops

Ideal for those who enjoy interactive learning, these workshops can close skills or knowledge gaps, support strategic change and build a common focus. By applying the learning, teams build confidence and credibility in key areas that are fundamental to success.

Leadership, communication and influence

- Coaching & Mentoring Workshop – practical knowledge & skills to develop people & raise performance
- Time Management – take time out to build up your skills for making important things happen
- Influence and Buy-in – essential engagement skills for influencing others and getting your ideas heard
- Learning about Learning – fundamentals skills for all the team, for those preferring interactive learning
- Executive Workshop – create a common leadership focus on opportunities for performance improvement

Planning & Resourcing

- Planning Insights – for team leaders & planners to understand the key drivers of operational performance
- Advanced Planning Techniques – models & methods to dig deep in forecasting & scheduling for all channels
- Flexible Working Master Class – an in-house workshop linked to consultancy or a corporate project
- Real Time Master Class – share best practice & take your approaches & framework to the next level
- Back Office Planning – explore long range, waterfall & short-term models. Create a development roadmap
- Operations Management – engage operational managers & team leaders for improvements in the back office
- Analysis Techniques for Planners – take a look at the workshops for analysts in the section below
- Advanced Forecasting – explore models & analysis techniques, such as decomposition, Poisson & EXCEL solver

Customer Experience, Quality & Insight

- Team Manager Workshop – build confidence with numbers and understand key drivers of customer experience
- Insight Master Class - skills & knowledge to move from reporting to insight. Develop value-adding tasks
- Quality Master Class – skills & knowledge to help you roll out a new Quality Assurance Framework
- Advanced Analysis Techniques - tools & methods to analyse data from multiple sources & present visually
- Telling a Story with Numbers – inspiration and practical techniques for both analysts and planners
- Customer Journey Mapping – learn practical tools and techniques that you can apply in your organisation

Build the capability within your teams to deliver key business changes

- These one or two day workshops can be run on-site for your organisation or by sharing the workshop across organisations in a particular location (eg groups of local councils or housing associations)
- Workshops can be undertaken as part of a change project or a team/individual’s development plan
- Some are run as public workshops, contact us if you are interested in a topic not in the 2017 calendar
- Workshops are interactive learning experiences; preparation and follow up work may be required
- Supported or accredited learning pathways can be combined with workshops for maximum value
- These topics address the needs of many roles – tell us if further topics could be added to our programme
Flexible learning programmes for all your team

A vast range of learning opportunities are available by taking individual modules from our collaboration with Ulster University Business School. Focus on specific skills or knowledge gaps and establish a platform of study skills that can be built upon at a later date.

Specialist skills that make you more effective in your current role

- Introduction to Planning or Analysis – modules providing essential skills and knowledge in these areas
- Advanced Techniques for Planning or Analysis – two workshop-based modules for advanced skills
- Communications – evaluate & select mechanisms that fit your organisation and lift performance
- The Experience Economy – map market changes that are shifting focus from products to experience
- Insight and Methodology – tools and methods for qualitative & quantitative research or benchmarking
- Customer Experience Design – translate your brand into customer experience journeys across channels
- Aligning the Organisation – apply understanding of how organisations change to people & process
- Measuring Customer Experience – how to build scorecards or dashboards and identify improvement actions
- Business Coaching & Mentoring – apply models of how adults learn to develop practical effective skills
- Operational Levers – understand the impact of decisions and ‘why’ key levers drive business performance
- Technology – two virtual modules: emerging omni channel technologies or planning & quality systems
- Other programmes include: leading high performance teams, managing people, knowledge management and account relationship management – plus our benchmarking or project modules for personal learning pathways

Strategic stretch and challenge – opportunities from the BSc Honours year

- Assessing and Planning the Future – understand corporate strategy, what it is and why it is important
- Leadership & Building teams – explore what makes a leader and review your own leadership style
- Financial Controls & Reporting – core principles of budget responsibility & reading financial reports
- Managing in Practice – a bespoke independent learning pathway or research project
- Operating in a Global Context – recognise new opportunities, growth sectors and effective strategies

Learning opportunities that blend the best of academic and business worlds

- Students complete assignments to University standard and receive support from tutors. They can receive a script of achievement and may continue studies later to complete a qualification, which requires the completion of several modules, not just one
- Individual modules require time commitment over a shorter period than a full 6 or 12 month university development programme. They relate to a specific set of learning outcomes and introduce these learning opportunities at a lower cost per individual
- Most modules can be undertaken in your own time or at work, using digital content and skype-style tutorials. A few are workshop-based, requiring travel
- Many students find it beneficial to use regular member events for networking & engagement, if places can be allocated to them to support this. They can join online discussion groups, buddy individually or access group mentoring support
- The range of opportunity covers topics for almost every role and the lower cost makes it possible for you to offer development to all your team, a small cost in comparison to salary budgets

Contact us to discuss how this can support you and your teams – or book now for a single module.
The Forum’s Suite of Flexible Learning Programmes

Our 2017 programmes offer a wide range of options so that you can match these to your specific learning outcomes and calendar constraints, and build the capability & confidence that credibly add value in your organisation.

<table>
<thead>
<tr>
<th>Linked to which programmes?</th>
<th>Continuing Professional Development</th>
<th>Personal Learning Pathway (A)</th>
<th>Personal Learning Pathway (B)</th>
<th>Knowledge &amp; Skills Training Workshops</th>
<th>Flexible Learning Programmes</th>
<th>University Development Programmes</th>
<th>Corporate Development Academy</th>
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</thead>
<tbody>
<tr>
<td>Linked to which programmes?</td>
<td>Accredited professionals &amp; members</td>
<td>Site Visits Conferences &amp; Workshops</td>
<td>Challenge Standards Benchmarking</td>
<td>Workshop Programme OnSite Support</td>
<td>University Programmes</td>
<td>University Programmes &amp; Qualifications</td>
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<td>Purpose &amp; outcomes</td>
<td>Self-directed learning based on personal, goals and available resources</td>
<td>Support personal learning outcomes related to the events &amp; personal goals</td>
<td>Support personal learning outcomes related to team programme goals</td>
<td>Close skills gaps, support strategic change &amp; build a common focus</td>
<td>Individual modules focus on specific skills and build a platform of study skills</td>
<td>Build the skills &amp; confidence to challenge thinking &amp; add value at a higher level</td>
<td>A strategic approach to develop talent &amp; capability in your business</td>
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<td>Programme length</td>
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<td>6-12 months</td>
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The University Programmes and Qualifications are accredited by our partners at [Ulster University Business School](https://www.ulster.ac.uk/business-school).
University Qualifications & Professional Development Programmes

In partnership with the Ulster Business School, our world-class learning and development programmes now give access to undergraduate qualifications that combine the best of both academic and business worlds. These have become a benchmark of excellence for customer contact professionals, available globally and across all industry sectors.

“This is the first globally awarded University accreditation, designed in conjunction with the industry, to recognise the growth, professionalism and importance of customer contact.”

Tim Moruzzi
Course Director,
Ulster University

“As my knowledge and learning developed, this has opened up so many opportunities.”

Su-Ann Pauline
Resource & Planning Manager,
Aegon Scottish Equitable

“Thank you... [the course] was really eye opening and will be a massive benefit to me and my team moving forward.”

Gavin Symons
GL S&S Resource Planning Analyst
LV=

Why do it on your own? Use our established development programmes to build your planning capability and develop your team of professionals.

Contact the team to find out more and reserve your place.
Blend the best of both academic and business worlds

Are you taking advantage of our Learning & Development partnership with the Ulster University Business School, giving access to undergraduate qualifications? This is the first globally-awarded University BSc in the Customer Contact environment, designed in conjunction with the industry.

- The full BSc currently contains over 30 modules. While it can be taken over 3 years, students often find a complete degree is possible in 2 years, due to prior learning or experience.
- Many professionals will want to combine all three programmes to gain the full BSc (Honours). For others, the Advanced Certificate or Diploma can be taken as programmes in their own right to build skills in a wider team and avoid gaps when current specialists move on.
- Defined development paths are charted for professionals in Planning, Data, Analytics & Insight, Quality & Customer Experience and for contact centre managers and team leaders.

**Essential Skills & Knowledge: Advanced Certificate Qualification (Level 5)**
- Excited by a university qualification that recognises your specialist skills?
- Looking for a comprehensive introduction to analysis, planning, quality or operations? Need a solid foundation for new responsibilities? Want to ensure you have no critical knowledge or skill gaps?

**Advanced Specialist Development: The Advanced Diploma Qualification (Level 5)**
- Want to broaden and develop your specialist skills to an advanced level?
- Excited by a qualification that supports your continuing professional development? Need new skills and knowledge to innovate and develop in your role? Looking for new approaches? Want to improve your business report-writing skills?

**Strategic Stretch and Challenge: The BSc Honours year (Level 6)**
- Looking for strategic stretch and challenge for your career development?
- Open to learn about other business functions and expand your thinking? Could you benefit from research experience and extended report writing skills?
- Want a degree qualification that is becoming the new industry benchmark?

Delivered in partnership by The Forum and Ulster University Business School: http://ppf.bz/UniversityQual
The blend of academic and business approaches challenges thinking, so that students build the skills and confidence to contribute and add value at a higher or more strategic level in their organisation.

The programme includes many opportunities to research, analyse and review your operations from the outside in and crowd source ideas from the professional community – free consultancy!

There is a tangible change in mindset & behavior when training has academic depth. There is a higher cost, but university qualifications and credit points carry a high motivational value.

People feel valued when they see investment in them and know they are progressing. Benefits match investment, but this programme can be tailored to your needs and budget.

Students build the capacity to effectively assess their own capabilities, develop new skills or knowledge and build on their strengths.

Accrediting Previous Experience

This programme attracts mature students with wide experience; they are not required to study a module if they have already achieved relevant experience in their work.

- There is a straightforward process for this, called APEL. Students answer questions and give evidence that demonstrates knowledge around a module’s specific learning objectives.
- After review, credit points can be awarded, allowing students to enter the programme at an advanced point. Equally, a set number of units need to be taught for each qualification.

Delivery Style

Students undertake this programme in their own time or at work; it has many online elements, yet the adaptability to be taught face-to-face.

- Students normally attend 2 days of workshop for each 6 months of study, usually held near Manchester Airport or on campus in Belfast. In this way, students meet the course team and their peers – and benefit from interactive, intense learning.
- Other material is delivered digitally on a weekly basis – for example: a lecture downloaded for review, a skype-style tutorial, recommended reading or worksheets to complete.
- This provides a framework upon which students build their learning experience. As students put ideas into practice, it’s important they can discuss these with colleagues and managers, as well as reviewing their experience individually and sharing within their tutor groups.

Tangible benefits for both individuals and their employers

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Undergraduate Qualifications for Customer Professionals

The full BSc is split over 3 years, but is flexible so that students can work at different levels and gain qualifications after just 6 months. After each phase, students can proceed to the next level or graduate (and potentially return later). For students completing individual modules or programmes, all credit points are fully transferrable to other Higher Level Institutions.

<table>
<thead>
<tr>
<th>Year 1 (Level 4)</th>
<th>Year 2 (Level 5)</th>
<th>Year 3 (Level 6)</th>
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<tbody>
<tr>
<td>Module 1</td>
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- People feel valued when they see investment in them and know they are progressing. Benefits match investment, but this programme can be tailored to your needs and budget.
- Students build the capacity to effectively assess their own capabilities, develop new skills or knowledge and build on their strengths.
Essential Skills & Knowledge
The Advanced Certificate Qualification

Who is this for?
- Excited by a university qualification that recognises your management skills?
- Looking for a comprehensive understanding of customer contact operations?
- Need a solid foundation for operational knowledge and skills?
- Want to ensure you have no critical knowledge or skill gaps?
- Build skills in a wider team, to avoid gaps when current managers move on

A solid foundation for effective performance
This is the start point for a planning or analysis career; the programme also provides essential skills for operational or customer experience management and for team leaders. Blending best practice, practical research and academic rigour, the programme introduces all the key elements for effective performance in your role through three modules:-
- Introduction to your role
- Customer Contact Operations
- Innovation & Change Project

Significant Business Benefits
Commencing with essential skills training, students benefit from mentoring and support to make practical suggestions and improvements during the 5-month development programme.

Managers comment on the value of new ideas and approaches which students are able to bring into their operation, despite being new to role in many cases.

The programme includes work-related benchmarking and process reviews as well as the change project. Written assessments, in the style of business reports, also help students develop key skills.

Virtual Learning
Primarily using online resources, with regular telephone tutorials or web meetings, material is distributed on a weekly basis. Students will be directed to recommended reading, videos or other resources and encouraged to participate in The Forum’s regular best practice activities.

“I've developed my analysis skills .... It's enabled me to look at my business differently and I have identified how we can improve”
Claire Richardson
Performance & Process Manager,
Worcestershire County Council

“It's a new lens to look at the way we do things and consider a new approach. Through the course I now have a network of support”
Mark Anderson
Schedule Analyst,
The AA
Advanced Specialist Development

The Advanced Diploma Qualification

Who is this for?

- Want to broaden & develop your people management skills to an advanced level?
- Excited by a qualification that supports your continuing professional development?
- Need new skills & knowledge to innovate & develop in your role?
- Looking for new approaches? Want to improve your business report-writing skills?
- Deepen your management skills, to avoid gaps when current experts move on

Advanced Diploma

Advanced Skills Module

- Initial two-day workshop
- Focus learning objectives

Virtual Learning Environment

- Access online learning resources
- Group webinars to share learning
- Virtual discussion & networking
- Guided research & mentoring

Varied & Stimulating Content

- Choose from 20 modules
- Option to graduate with specialism
- Widen your skillbase
- Events & Seminars

Work-based assignments

- Evaluating new approaches
- Regular business reports
- Varied presentation styles
- Highlight learning & achievement

Practical and Challenging

This 6-month programme equips students to evaluate new approaches and challenge appropriately, with the four modules extending their specialist skills and knowledge. Mentoring supports students in applying ideas in their workplace, with emphasis on group activity, shared learning and communication in business. Foundation planning skills are a pre-requisite, gained through the Foundation Programme or by prior learning & experience.

5 Specialist Pathways

Graduate with one of five specialisms, or choose a more bespoke pathway which enhances your skills in many areas. Specialisms currently include:

- Resource Planning
- Quality & Customer Experience
- Data, Analytics & Insight
- Commercial Sales
- Operational Management

Flexible Learning

The choice of 20 modules allows your study to be focussed on your particular needs. This makes it possible to undertake work-based projects, benchmarking and reports that take your specialist skills to an advanced level and often deliver tangible benefits to the business or service. It is possible to study any module either ‘standalone’ or as part of an accredited qualification – contact us for details of our Flexible Learning Programmes.

Choose from 20 different modules to reflect your chosen specialism

<table>
<thead>
<tr>
<th>Introduction to Planning</th>
<th>Aligning the Organisation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective Operations</td>
<td>Measuring and Sustaining Customer Experience</td>
</tr>
<tr>
<td>Innovation &amp; Change Project</td>
<td>Key Account Relationships</td>
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<tr>
<td>Customer Contact Analysis</td>
<td>Operational Levers</td>
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<tr>
<td>Advanced Analysis Techniques</td>
<td>Managing &amp; Developing People</td>
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<td>Operations &amp; Quality Systems</td>
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<td>The Customer Experience Economy</td>
<td>Customer Contact Technology</td>
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<tr>
<td>Insight and Methodology</td>
<td>Business Coaching &amp; Mentoring</td>
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<tr>
<td>Customer Experience Design</td>
<td>Leading High Performance Teams</td>
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</tbody>
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# BSc (Hons) in Customer Contact Planning & Management

Do you want to build on the Advanced Diploma with this final year programme?

- Want a degree qualification that is becoming the new industry benchmark?
- Looking for strategic stretch and challenge for your career development?
- Open to learn about other business functions and expand your thinking?
- Want to blend the best of both academic and business worlds?
- Could you benefit from research experience and extended report writing skills?

## BSc programme

**common to all programmes**

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## Assessing and Planning the Future

Strategic analysis of organisation, strategy development and its application. Role of corporate and marketing strategy. Strategic perspectives and skills.

## Leadership & Building Teams

People management structures and performance improvement programmes. Identify and analyse the skills base and the use of motivation.

## Financial Controls & Reporting

Evaluate and appraise organisational performance, using financial information systems, taking account of policies and legal requirements. Understand planning, decision-making and control. Monitor and control resource usage.

## Managing in Practice

Define your personal learning journey in a key development area (for you or your organisation). Create your learning goals & roadmap, implement this, with formal & informal interventions alongside reflection, practical application and critical review.

## Introduction to the Global Industry

- Revenue potential in emerging & established markets
- Strategic identification & exploitation of opportunities
- Global market opportunities and growth sectors
- Effective sales strategies

## Research and Dissertation

Develop understanding of research methods. Apply, synthesise & evaluate theories and frameworks. Identify research aims, develop a research proposal and write the dissertation.

“From experience, Resource Planning departments can all too easily become focussed only on numbers, processes and efficiency. Thinking about the use of emotional intelligence to understand quality inspired me to review my own interactions with internal customers. This is an area for further personal review, has already been added into my development plan, and will be reviewed in planned development sessions with my team”

**Anthony Edmed**
Capacity Planning Manager, John Lewis

“I never believed that you could offshore or outsource any part of a police centre. I can see ways of transitioning certain services to a different operating model and in turn use the savings to strengthen core services for citizens”

**Tracey Howe**
Resourcing Manager, Thames Valley Police
What students say about the benefits of the university programmes

The blend of academic and business approaches challenges thinking, so that students build the skills and confidence to contribute and add value at a higher or more strategic level in their organisation.

How is this helping your professional & career development?

These qualifications open up roles to a wider pool of talent, because they are so relevant to the job. This retains knowledge and experience in the business
- The next level was too big a step, I want to be confident to fulfil such a role
- I want to strengthen my technical skills as an expert & be capable of more
- I began this role after 19 years as an agent; this training makes it possible
- I want to challenge why we do things the way we do, and make things better
- I’m developing skills so I have confidence & credibility for a ‘head of’ role
- I really enjoy learning and being the best at what I do

What do you expect to get from this learning programme?

- This is teaching me new aspects of the role, it’s already given me confidence
- I use things I learn every day in my planning role
- I’m looking to refresh my knowledge, learn new things, see what others do
- This is an opportunity to evolve and learn in the role; I’m really enjoying it
- This gives me a greater understanding, new strategies – and a qualification
- I want to gain more knowledge and share experiences
- We have lots of home grown knowledge; this closes the gaps we saw in Standards Benchmarking and takes our capability to a new level.

What do you plan to do with the knowledge you acquired?

- Map the gap in our processes, capability and methodologies
- I want to professionalise our team and improve our ability to influence
- Review our metrics and develop accountability for performance
- Tell a clearer story of the drivers of forecast and schedule accuracy
- Develop accountability for performance and implement new processes
- From each assignment I’ve come back to my everyday role; it’s made me think about how we can improve and given me the opportunity to network.
- Present ideas to my team, practice, develop flexible shifts and innovate!

“I wanted to focus on developing my skills and feel the ability to make a tangible difference”  
Kristian Scott-Scott, Resource Planning Manager, Gold Medal Travel

“I moved from call handling to real time and then planning analyst. I really enjoy learning and being the best at what I do”  
Sandra Rhodes, Resource Planning & Performance Analyst, LV=

Simon Butler, formerly Head of Best Practice, was talking with 2015-16 students on our University Development Programmes, delivered in partnership with the Ulster University Business School. Interviewees included: Dal Kaur, Yorkshire Building Society; Richard Carless, Direct Line Group; Kristian Slater-Scott, Gold Medal; Leanne Hallett, Leanne Grant, Laura Lindsay, RS Components; Ann Johnson, Leeds Council; Dimitrios Tziatziafis, Tesco Bank General Insurance; Carl Bridgman, Thames Valley Police; Sandra Rhodes, LV=.
Invest where it matters, with your own corporate development academy

We help you create and manage a strategic approach to developing talent and capability in your business, working with Ulster University Business School and other partners as well as your existing suppliers. Your branded academy offers university accreditation for induction and development across all roles, as well as proven programmes for specialist teams.

"The very specific objectives of the programmes have been tailored to students' needs within this industry sector and clearly offer appropriate learning experience of participating students... the learning is designed to be effective and has effect within the sector."

External Examiner Report
October 2016

"Training helps people to create their own opportunities... we spend our money wisely."
Beverley Webb
Director,
InterCall

"It is extremely important for us to react to industry trends and adequately prepare our people for their journey in role. Integrating certification into their career growth path is a win-win for organisation and staff."
Laura Hourican
Vice President, Human Resources UK,
Firstsource Solution Limited

Use our knowledge and exposure to best practice to help you drive improvements.
Contact us to discuss how this exciting opportunity can raise standards in your organisation.
See the benefits of your own branded development academy

Map out where talent and capability can help your organisation excel in your market. We work with your internal and external partners to create a comprehensive roadmap for development and manage the quality of the outcomes, so you can see the difference it is making.

Gain university accreditation of induction & development across all roles

Well designed induction and development programmes can make a very significant improvement in first contact resolution, customer satisfaction and employee engagement – as a result of higher levels of knowledge and understanding and a sense of genuine progression and feeling valued.

University education can carry a high cost, but workplace programmes such as ours are extremely cost effective and university qualifications or credit points carry a high motivational value and can support significant benefits from reduced employee attrition.

- An organisation who recruit 100 new start agents pa due to attrition could save £100,000 pa by increasing average length of service just 2-3 months, based on average £5,000 cost of recruitment including salary in training and any period before reaching full competency.
- Join a consortium of organisations applying for approval of our programmes with Ulster University as investment in context of the Apprenticeship levy (0.5% of payroll annually) on all companies with a payroll greater than £3m from April 2017. The consortium will apply for funding access in respect of Higher and/or Degree apprenticeships.

Proven programmes for Planning, Insight, Quality & Customer Experience teams

The development programmes and qualifications provided in partnership with Ulster University Business School – alongside our suite of innovative and flexible learning approaches – provide a solid and well-proven framework for development of key support professionals.

An academy under your brand run by The Forum, can include skills assessments, professional accreditation, university qualifications, and specialist training all combined with your own Learning & Development resources – whether provided by internal or external partners. This is a fantastic way to demonstrate your commitment to these professions.

Payback can result from creating capacity to deliver value-add or strategic change initiatives within the business – as well as from demonstrable benefits in retaining and developing key talent and knowledge.

Invest where it matters and stand out from the crowd

- There is a tangible change in mindset and behavior when training has academic depth and accreditation
- There is a higher cost, but university qualifications and credit points carry a high motivational value
- People feel valued when they see investment in them and know they are progressing their development
- Benefits match investment, but this programme is flexible and can be tailored to your needs and budget
- Attract a different level of candidate if new-starts can gain qualifications whilst in induction. It’s a unique selling point in a crowded job market and can lower attrition if built into everyone’s development
Your Continuing Professional Development

No matter where you are in your career, no matter how experienced you are, the investment you make into continuing your professional development will pay you back time and time again. Take advantage of our resources as you continue your professional development journey; tap into best practice, develop your skills and deepen your understanding.

Use our knowledge and exposure to best practice to help you drive improvements. Contact any of our team to discuss how Professional Development can help you and your teams to be fully effective in adding value to your business.
Take your professional development to the next level

Our Accredited Professionals programme offers an unrivalled opportunity for professionals in planning, insight, quality or customer experience roles, in customer operations. Extend your professional network, access our online resources and gain accreditation as a professional.

- Would you benefit from being recognised as a professional within your discipline?
- Does sharing best practice, learning from others and being part of a community of likeminded professionals interest you?
- Would you like to stand out from the crowd next time you apply for a new position?

A passion for improvement and development is the hallmark of every true professional. As professionals we don't have to wait for others or be invited to learn; we take personal responsibility continually striving for excellence. Perhaps you are already focussed on your development. Do you have a plan in place, actively working towards your goals? Are you seeing the results and value of increased awareness of learning, self-reflection and self-awareness? What else could you be doing? To become an accredited professional, you need to continue your professional development (CPD).

What’s involved?
A key part of professional development is taking the time to stop, self-reflect and capture what you have achieved and where your strengths are is motivating and fulfilling experience (see the next page). In addition, understanding where you could develop further to take your skills to the next level is crucial in identifying & prioritising future development opportunities. Focussed professionals develop further and faster.

As an Accredited Professional in our Forum you are not on your own. We are passionate about helping one another, making a difference and recognising both excellence and innovation. When you join the programme, you will gain access to our online social media community and we encourage you to build up your professional network and post on Chatter (our online forum). You might ask questions, support other members who are on their own learning journey and sharing your own thoughts, challenges and ideas.

Another part of professional development is taking regular time each week or month for some activity that supports your development – such as an event, online research or reading a book. As a member, you will be given our Professional Development eBook – with access to online courses. This is a good place to start. Start by building awareness of the methods that work best for you. Then, some may take on-demand learning resources in steps over several months, others might allocate a few afternoons or evenings during the year or even take a couple of days out to really focus – even to spend part of some weekends.

Self-Assessment
When you are ready, you start the path to accreditation by assessing yourself against groups of skills (clusters) relevant to your Professional Community. The facing page gives examples of the templates that you will complete. Once you have completed the first cluster of skills, you return it to us and one of our independent panel of Accredited Professionals will review your submission, provide any initial feedback and get you ready for the next assessment. There are five clusters in total and once they have all been submitted, your assessments will go to a panel meeting where the level of your accreditation will be confirmed.

Professionals who are already accredited say that having recognition from an industry body helps their credibility both internally and externally. They also say that having a place to go to where they will receive support and challenge when they’re raising the standards of what they are doing is of huge value.

Get involved and become a member of our professional community
Getting involved is easy. If your organisation is already a corporate member of The Forum, simply speak to the person in your company who manages the membership. If your organisation is not a member, or you want to become a member independently, you can still be part of this programme at a cost of just £7.50 per month.

Simply, email accreditation@theforum.social to register or visit http://ppf.bz/AccreditedProf.

Collectively we are raising standards in Customer Operations and going further, faster, together.
Assessment at your own pace. Once you have the toolkit to complete the assessment it’s entirely in your gift how quickly and how much time you take to complete it. We’ll keep in touch and check that you’re still progressing but in the spirit of own your own learning it’s up to you when you do this.

Different styles of assessment to meet your learning preferences. We understand that for some people the thought of completing ‘question, answer, question, answer’ just isn’t engaging, while for others it can be just the format they need to help stimulate their minds. We have created different self-assessment forms that meet different needs. Option 1 suits those people who favour visual and kinaesthetic learning styles and like logic and order. Option B is more suited to people who favour auditory learning styles and like to be creative and dislike structure. If you’re not sure which type you are, try both and see which you prefer.

Varying depths of assessment to suit your needs. Sometimes we like to look at things from a high level, other times we like to drill down into the detail underneath. The assessment framework is flexible allowing you to stay at a high level if that’s your preference or take time for detailed reflection if that’s useful to you. There are no right or wrong answers here – the value is in what you get out of the experience of stopping, reflecting and evaluating.

Four levels recognise each stage of your professional career

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<th>Accredited Specialist Professional</th>
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<td>Takes personal responsibility in your role, with the skills to perform required tasks to a good level and contribute ideas to support continuous improvement. Passionate about your profession and your own development as a professional, regularly taking steps to learn from other organisations and build your own capabilities.</td>
<td>Effective and takes initiative in a wide range of tasks, using insight and experience to make recommendations and engage stakeholders at many levels. Passionate about improvement, taking advantage of qualifications or other learning opportunities, building your professional network and contributing in discussion or hosting events.</td>
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Accredited Professional Member

Recognised internally and externally as an expert, a role model for your profession, confident on complex or strategic tasks and taking judgements in sensitive areas. With qualifications or deep experience, you will be actively developing the profession, contributing to push the boundaries of good practice and invited to speak, write or moderate discussions.

Fellow

With wide experience at a very senior level in your profession and a track record for excellence, innovation, customer focus and effective business contribution, fellows are recognised outside the organisation, as actively sharing and adopting best practice, passionately building the profession. By invitation only; nominations welcome.
Learning about learning

Learning to Learn

The ability to learn is a skill but not one that is notably heavily invested in. Being able to seek out, absorb and most importantly utilise new found skills, knowledge and understanding is surely a foundation to all development, no matter the subject.

How many times have you attended a training course to find the flow of information isn't really working for you, or re-read the same paragraph in a book time and time again and still made little sense of it, or found that no matter how hard you try you just can't quite master the basics in a foreign language?

Part of this is down to your personal learning style and preferences, part of it is down to the filters that you apply when you learn something new, part of it is the expectation that you or others set upon yourself, but part of it can also be the fact that we’ve forgotten how to learn. With a myriad of ways in which we can harness and assimilate information, it is no wonder that what worked for us in the classroom in our earlier years may elude us in the workplace today.

Where traditionally learning was largely done independently, there is a massive social movement in the learning space now and collaborative learning, either physically or virtually, with known fellow students or complete strangers who are undergoing a similar journey, plays a significant role in the way we instinctively learn today.

In addition, it may help if we understand why we want to learn. Some learn for learning’s sake; i.e. their motivation lies within having new found knowledge. Others learn in order that they achieve goals and others still learn in order to be social or part of a group that is learning together.

Take a moment to reflect on your learning ability, your preferences, your motivation. Read more about learning styles on page 8. If you’d like to learn more about learning to learn, the Open University run a free online course which you can access via this link.

http://www.open.edu/openlearn/education/learning-learn-you-and-your-learning/content-section-0

Learning trends

This article is inspired by the report that the Open University published earlier this year, Trends in Learning 2016. You can access the full report by following this link.

http://info1.open.ac.uk/l/82412/2016-04-29/2hsmrl

Not only is technology changing the way we interact with each other, with companies of which we are customers and with the world around us, it is also changing the way that we learn. ‘Bite-sized learning’, ‘mobile learning’, ‘pull not push’, ‘just-in-time learning’ (also referred to as in-the-moment learning) – are all about the learner and our habits and desires to access content. Learning behaviour in a work context is mirroring how we learn in a non-work context. Previously this had been divergent; if someone wanted to learn something in a work context they would go on a training course, if they wanted to learn something in a non-work context they would go to Google, YouTube or similar. Now we are seeing that as learners, we want to access work related content in the same way that we access other content – online and in a format that is easy to digest, leads to further learning (e.g. recommended for you), can be rated and commented upon and is mobile.

See how you identify with and can further embrace these trends in learning.

1. Incidental learning. The learning that we do instinctively, that is often unplanned, that is totally immersive and sometimes so much so that we don’t acknowledge that we’re learning. The stuff that we do ‘on the job’, with others or independently, where we find ourselves in new situations, new dynamics or with a renewed purpose in mind. What’s important with incidental learning is to recognise when it takes place and take ownership of what you have learned, what that means and what you are now capable of doing.
This is all about adjusting learning content to address each individual's drives and challenges. e.g. Adjusting pace, taking into consideration prior experience and knowledge, using gamification, providing interactive support. How well does your L&D function do this? How well do you do it when you are sharing knowledge with others?

3. Embracing MOOCs.
For those of you who are academically inclined, this one's for you. Thanks to Massive Open Online Courses (MOOCs), millions of people are signing up to these free, online learning opportunities. Whether using them for your personal or professional development there is almost a course for everything. And if you feel that you need to get back into learning, there are far worse places to start. At an average of 3hrs per week study time, they're accessible to most people.

Watch this space for what we at The Forum are doing around this in 2017. Historically this was about getting a badge for an accomplishment such as learning to swim or competing in a race but now badges are finding their way into the workplace and meritocracy plays a key part. Think tripadvisor and how the 'level' of the reviewer is enhanced the more reviews they post, or 'helpful' submissions they receive. The same is true of learning platforms where individuals are encouraged to post, share and comment on the insight of others. Our preferred community engagement tool, Chatter, is no different.

5. Learning Analytics.
In a world of big data it is no surprise that data, and the analysis of such data, is leading practitioners to better understand how people learn and then use this information to increase performance outcomes by better supporting learner needs. In addition, the sharing of this data, showing how an individual is learning in comparison to their peer group, can help identify an individual's potential success as well as flag any changes that may help further enhance their learning experience.

6. E-books as learning platforms.
This isn't just the electronic publication of material. As e-books evolve they are becoming interactive documents that study groups can read and annotate together, that teachers can re-write (in part) to help contextualise learning, that can be created by crowd-authoring and that can embed software to help bring to life the content. They create new ways for people to connect and interact providing a more social form of study. Whilst e-books may not be commonplace in the working environment just yet, the way in which knowledge management content is increasingly being owned by the teams that use the tools is one example of this collaborative and contributory concept.

7. Learning to love mobile.
People enjoy using their own devices as they act as their own individual learning environment and social network. They enable us to access information, conduct research, finds answers and learn new things. And they enable us to connect and interact with others during the course of a learning experience. In addition, this is about how our desire to access content is changing. E-learning is moving towards m-learning (mobile learning) as this is no longer just about content being available in a digital capacity but that it has to be available anytime, anywhere.
Take continuing responsibility for your own professional development

A really strong theme emerged from our Professional Development Month this August. When we work with our natural preferences we learn much better. "I now realise why I wasn't really learning before" said one of the participants. "Now, I work with my preferred learning style, which enables me to select the right kind of development". It's more enjoyable, learning sticks better and we do lots more of it!

The e-book that we launched then is available now for continuing use, pointing you to valuable, free resources that are available on-demand. It has four straight-forward steps towards becoming an accomplished learning professional: learning to learn, self-awareness and development, involving others and making the difference. It is designed to be a reference point, an instigator of other activity and a reminder that a little can go a long way.

Julie Dirksen, an author specialising in L&D, says that learning experiences are like journeys. "The journey starts where the learning is now and ends when the learner is successful ... the end of the journey isn't about knowing more, it's doing more". As professionals looking at Continual Professional Development (CPD), our journey may never be over, as we change roles, as our industry changes with new technology, new products, new colleagues etc.

We are always in a position to learn and develop, we are also in a position to make a difference, as we take our previous learning to guide us towards the future. CPD isn't about looking for ratification or gratification of your new found skills and knowledge, it's about knowing that you have done the best you can, being selfless in applying your learning and knowing that through your actions and behaviours that you are making a difference to those around you.

Goal setting is an important part of CPD, looking back to see what you achieved, and how this has impacted the work you do. One of the methods, we suggest you try is called the 'Seinfeld Strategy'. Jerry Seinfeld is arguably one of the most successful comedians of all time and he developed a technique to stop him procrastinating. The premise is simple:

- Pick a task
- Do it every day
- Make a difference

In essence it's about creating a chain to keep you focussed on the goal and objective, but the key element is that your daily goal is an achievable and repeatable goal (in Jerry's case, writing a new joke every day) – ours could be reading an article, part of a book, completing a competency within our skills framework, the choice is yours but as you build your chain, you become determined not to break it, it becomes part of your daily routine, it becomes a critical part of your CPD behaviour.

You make a difference by committing to your learning, you make a difference by being aware of your strengths and weaknesses and you make a difference by sharing your learning either consciously or sub-consciously but one thing is for certain CPD will help you make a difference.

Digging deeper

To access the activities below visit our website to further your Continuing Professional Development at: http://ppf.bz/ForumMaterials

Read This
- What can we learn from Jerry Seinfeld: Stop procrastinating & the hard truth about achieving your goals – read this online article
- Trends in Learning 2016: download the CPD online e-book from the Open University

Watch This
- Why we should never stop learning: How to set goals – read this online article

Do This
- Try using the Seinfeld method to complete your CPD plans. Download this free printable calendars
- Learning to learn: You and your learning – download this free Open University e-learning course
Learning about learning

Life-long learning: building on 16 years of professional development

Are you a rock or a sponge? A passion for improvement and development is the hallmark of every true professional. The last 3 years have seen significant, sustained investment by The Forum to build a healthy ecosystem that supports life-long learning.

Do we believe we already know everything we need to know? Or are we like sponges, as Sir Clive Woodward put it at the launch of our Leadership Forum in July 2015? From the outset the desire to learn and improve has formed the foundation of our approach to professional development. When The Forum was first launched, in

The vision shared just 16 years ago, when The Forum was launched in London on Wednesday, 22 March 2000, is an established reality today. We go further, faster when we work together as a profession.

March 2000, groups of professionals met in small networking groups to share best practice, learn how to avoid common pitfalls and gain support from others facing similar challenges. Within a year, there was strong demand for training and in our first year we were offering the first specialist course for contact centre planners at Regent’s College in Central London.

The same principles form the heart of our programme 16 years on, on a larger scale and support not only for Planners, but Insight and Quality professionals as well as business leaders. Even with 650 people at our flagship conference and hundreds in our learning & development programmes, each event is broken down into small groups who share and learn together. Some programmes offer in-depth specialist support for each professional community, with four national conferences, four award programmes, four annual challenges and so forth. Around this, the Innovation Awards, Customer Strategy & Planning conference and our new Leadership Forum all bring together the different disciplines. A key development in 2016 has been with the Challenge Programme, providing year-long support and knowledge programmes for planning or an Advanced Diploma from the advanced specialist skills programmes.

Crucially all these programmes are opportunities for learning & development – some focussed on the needs or teams or organisation, some on developing individuals, some on closing skills gaps. What each and every programme has in common is the desire to support professionals as life-long learners. It’s not only Sir Clive Woodward’s winning Rugby team who are ‘sponges’. Life-long learning – a passion to learn and improve – is the hallmark of every true professional.

Life-long learning: are you a rock or a sponge?

Sponges are passionate about their subject, they want to learn, to develop ... rocks are not, they believe they already know everything they need to know.

Sir Clive Woodward at the launch of our Leadership Forum 23rd June 2015.
Breakthrough: how are you utilising our support to drive improvement?

Invest for breakthrough. Use these checklists and find ways to maximise your strategic impact this year. Our leading members allow each individual one day per month to commit to professional development and deliver amazing results. What are you missing out on? What would give most value?

**Checklist for business leaders: maximise the strategic impact of your function**

- Build up organisational capability in vital areas and make a tangible impact on key business priorities.
  - Your own Corporate Development Academy
  - Standards Benchmarking and Accreditation
  - The Annual Best Practice Challenge
  - On-site Support and Consultancy
  - Talent Development and Succession Planning
  - Specialist Training, closing your skills gaps
  - Member Workshops and Annual Review
  - Ask the Expert, the member advice service
  - Professional network of best practice

**Checklist for individual professionals: release your potential, be the best you can be**

- Develop yourself as a professional, striving for excellence. What stops you? Use this checklist - it is in your gift!
  - Communities of Professional Development
  - Skills Benchmarking and Professional Accreditation
  - Virtual Learning Resources and Webinars
  - Best Practice Weeks, Site Visits and Workshops
  - Four National Conferences and Awards Programmes
  - Essential Skills and Knowledge Programme
  - Advanced Specialist Skills Modules
  - Advanced Diploma Programmes with Ulster University*
  - Expand your thinking with the full BSc for strategic stretch*

*Accredited by Ulster University
Leadership Forum

Raising Standards in Customer Operations
Join the professional network for industry leaders

- Create a shared industry vision
- Drive improvements that deliver business imperatives
- Grow customer and colleague engagement
- Develop talent & elite teams
- Build collaboration across functions to raise performance

“The Forum community has been a great way to share innovation and creativity…”
Richard Brimble, Director of Organisation Development, Affinity Water

Join us in London in the spring or at the Customer Strategy conference in Harrogate on April 24th – 25th

Contact us if you would like to invite your director or senior leader on 0333 123 5960 or email events@theforum.social

Customer Strategy & Planning 2017
24th – 25th April 2017
The Majestic Hotel, Harrogate

With over 650 delegates, Europe’s largest event of its kind is the must-attend conference for customer contact strategy and planning. Take advantage of our outstanding speakers, award-winning case studies, discussion groups and networking activities.

http://theforum.social/conference

Will you join our Accredited Professionals?

Gain recognition for your commitment to your own professional development and to best practice as a whole across the industry.

Are you ready to stretch yourself at each stage of your professional career? Our comprehensive framework enables you to focus your development and to credibly evidence your knowledge or experience.

It’s easy to get started on your accreditation journey for Planning Professionals

Contact us at accreditation@theforum.social or call 0333 123 5960 and we will help you on your way.