

CLIENT SUCCESS & SOLUTIONS HANDBOOK

EMPLOYER ENGAGEMENT STRATEGY

Code: DMLICP-001

Version: 4.2 Draft

Approved by: Davies (Professional Education)

Last Approved: TBC

Confidentiality level: Confidential

Change History

Version	Date	Author	Description of Change
1.0	26.07.21	VMiles	Full revision after Jul21 restructure
2.0	03.11.21	VMiles	Full revision after recruitment of Business Development team
3.0	01.12.22	VMiles	Full revision after team restructuring and operational changes
4.1	01.07.23	VMiles	Full revision after team restructuring and operational changes
4.2	29.12.23	JP/HW/VM	Full revision after team restructuring and operational changes

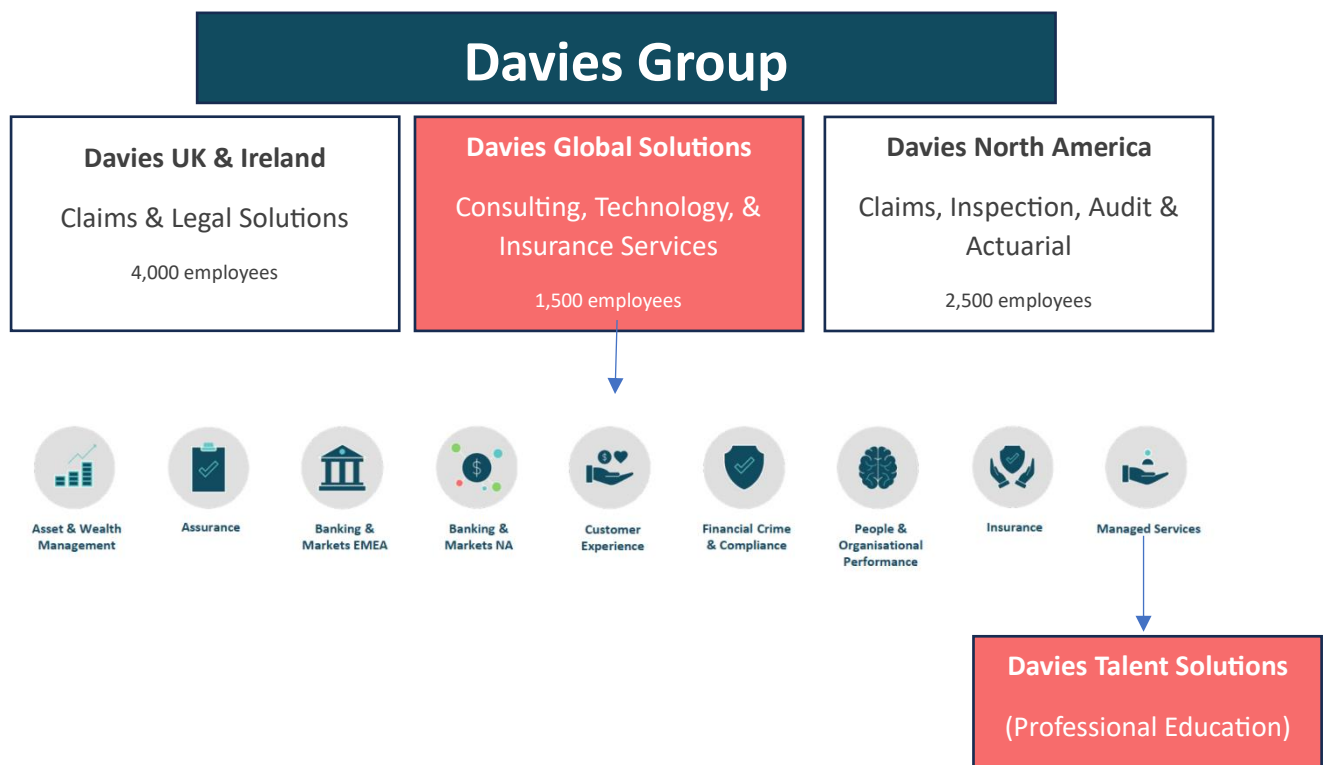
1.	Introduction and Context.....	3
2.	Our Vision	5
3.	Mission Statement	5
4.	Values.....	5
5.	Strategic Direction.....	6
6.	Employer Partnerships and Engagement	7
7.	The evolution of the Success and Solutions Team	9
8.	2023/24 communication planning as Talent Solutions.....	11
9.	Overall 2023/2024 Strategic Aims	13
10.	Leadership & Management Client Success	13
11.	Leadership & Management Client Solutions.....	14
12.	The local economy, employers and skills needs	14
13.	Our overarching statement of intent:.....	16
14.	Employer Profile, intelligence and LEP Priorities	16
15.	Client Success Team Responsibilities, Objectives and KPI's	20
16.	Client Success Employer Management and Process	22
17.	Client Solutions Team Responsibilities, Objectives and KPI's	27
18.	Client Solutions Employer Management and Process	28
19.	Accountability.....	29
20.	Operational Board reporting Client Success and Client Solutions.....	30
21.	Internal Communication and meetings.....	31
22.	Continued Professional Development.....	32
23.	Appendix.....	33

1. Introduction and Context

The business was established in January 2015 as an independent learning provider to provide a suite of apprenticeships in the financial services and insurance sector from L3 to L6. Davies Group (DG) acquired the apprenticeship business in September 2019 as their Professional Education offer to clients and re-branded to Davies Learning Solutions Ltd (DLS) in October 2020. Davies Group are a multi-national award winning successful commercial business working globally with over 8000 colleagues to offer professional services to the markets of Insurance and Financial Services, such in the operations management, consulting, and digital solutions sectors.

Davies Group provide services to organisations in highly regulated markets (including insurance, financial services, utilities, communications, and to regulatory bodies) and to global businesses, in offices located world-wide. Davies Group core service lines include Claims solutions, Insurance services specialist strands, and Customer solutions working across the UK, Ireland, Bermuda, the US and Canada with headquarters in the City of London. Command centre operations are based in Stoke-on-Trent, Colchester, Birmingham, Peterborough, Witham, Dublin, Hamilton and Toronto. Davies Group continues to evolve through acquisition, and in April 2023 Davies Group underwent a restructuring to rationalise capabilities and provide clear oversight of the geographies in which Davies operates and the services it provides to Insurance, Financial Services and High Regulated Markets. Three clear divisions have now been established (as shown below in the organisational chart) with Davies Learning Solutions (Professional Education) sitting within Davies Global Solutions in the Consulting subdivision.

For clarity, from this point forward Davies Learning Solutions will be referred to as Davies Professional Education, this is not a change to our legal operating name but aligns to the group vision of the services we provide.



To provide a joined-up service to our clients, employers and apprentices Davies Professional Education now sits within the new created (Jun23) Talent Solutions part of the Business. The joining of capabilities allows Davies Talent a clear focus on revolutionising the way organisations source and develop talent. Davies Professional Education delivers professional apprenticeships, bootcamps and commercial solutions to accelerate careers. As specialists in insurance, financial services, and regulated markets, we develop the professional and digital skills required to address today's challenges.

Our website can be viewed here [Davies Talent Solutions \(davies-group.com\)](https://davies-group.com)

As a resilient, strong performing and financially stable business, we continue to develop and improve our outturn growth and impact on our FE&S sector. This is alongside developing a culture of being an inclusive learning and skills effective education training provider in the further education sector. We have extremely high expectations instilled in our culture and ways of working and of our apprentices', the ways in which our employers support apprentices, our own staff workforce, and our stakeholders. Being part of Davies Group has subsequently provided us with the opportunity for further growth in the FE&S sector, enhanced our IT, digital skills and HR resources and broadened our destination and progression pathway opportunities for our apprentices and our workforce.

Our philosophy and approach to our work has helped position us as one of the leading UK apprenticeship providers in the very specialist financial services and insurance sector. Our first full Ofsted inspection was in November 2021 where we received an overall Requires Improvement Grade with elements of 'good' throughout every key judgement area. Furthermore, our 2021 Ofsted inspection called out 'specialist apprenticeship curriculum which meets the needs of a diverse employment sector' and our 'Leaders have aligned, structured, and sequenced what they teach to the apprenticeship standards well.' Since then, we have been committed to working on our areas for improvement. Particularly around the QAR data for Senior Insurance Professional Level 6, more information about this can be found in our 21/22, 22/23 and 22/23 QIP and SAR.

In our recent Ofsted monitoring visit in January 2023, we received an overall grade of Reasonable Progress. Ofsted commented that, "Leaders and managers have taken positive steps to improve the experience of the level 6 insurance professional apprentices. They have invested significantly in the resources to support the programme."

"Leaders, managers and coaches have high aspirations for their apprentices."

"Leaders work closely with employers to ensure the curriculum meets their needs. Leaders and curriculum managers have restructured the curriculum well and continue to make sensible changes based on the needs of the sector. This ensures that apprentices develop the relevant knowledge and skills they need to apply to and be successful in the workplace."

We continue to be Matrix accredited, which validates our strong approach to impartial careers, advice and guidance and robust quality framework processes to ensure consistent good practice across our provision.

We have also successfully reaffirmed our position as a RoAPT Training Provider having gone through the reaccreditation process in Spring 2022. Davies Talent also holds the license to run Flexi Job Apprenticeships, which is driven by Carolyn Blunt VP of Academy and delivered via our Specialist Resourcing in tandem with Davies Professional Education Apprenticeship Delivery.

2. Our Vision

“Davies Professional Education will be globally recognised as the leading Financial Services training and development Company”.

3. Mission Statement

“Powering professional development in Financial Services - attracting, retaining and upskilling the workforce of tomorrow”.

4. Values

Davies Professional Education aligns to the Davies Group global values.

WE ARE CONNECTED



- We are united under one mission
- We believe in the power of Davies to make a difference
- We are greater than the sum of our parts

WE ARE DYNAMIC



- We readily adapt to the changing environment
- We strive for what's next
- We relentlessly seek more: for our business, our clients, our colleagues and our communities

WE ARE INNOVATIVE



- We are solution-focused
- We have an entrepreneurial mindset
- We are empowered to discover new paths

WE SUCCEED TOGETHER



- We support each other to grow
- We value different perspectives, ideas and experiences
- We make an impact in our communities

5. Strategic Direction

Davies Professional Education has a clear strategic and defined direction which is effectively supported by a strong vision, ethos, and values. Strategic priorities are underpinned by ambitious targets, driven forward by the business and strategic plan, and are reviewed by the Senior Management Team (SMT) and the group Operating Board monthly. The Operating Board continues to have strong and effective monthly external support and challenge from a current FE & Skills Ofsted inspector.

We have recently strengthened our Operating Board with external senior representatives from another Training provider, Crawford Knott Managing Director of Hawk Training. The external senior representatives challenge the Operating Board with an alternative point of view and share their best practice and experience with the Operating Board. They join the Board on a quarterly basis at our Operating Board sessions. The focus of the Operating board is aligned to AELP Code of Governance and Expectations for Good Practice and the Ofsted EIF leadership and management key judgement requirements, and to ensure that each of our apprentices receive good quality of provision and education, teaching, learning and assessment and are able to successfully achieve their apprenticeship within their planned end date and progress into a positive next steps career destination of their choice and level.

The Operating Board is made up of Senior Vice President for Davies Talent, Vice President of Professional Education, Client Success Director, Consulting Director, Curriculum Director, Director of Quality and Delivery and Head of Business Improvement & Compliance.

Governance arrangements for Quality and Standards and the board of Directors continues to be strengthened through the acquisition of our organisation as FWD and the integrations of all functions and provision into the Davies Group. The board reports into the SVP of Davies Talent who in turn reports to the CEO of Davies Consulting. Our governance Terms of Reference (TOR), working protocols, agenda structure, meeting minutes provide robust oversight and educational direction for our quality of provision and education. Governance deployment of responsibilities ensures that we have a consistently good quality of provision for our apprenticeship standards offer and output of our meetings and governance direction informs our strategic improvement and development work.

Governance provides a very robust oversight of our employer partnerships and how we communicate and work with each employer which are aligned to the Ofsted EIF requirements and AELP Code of Governance and Expectations for Good Practice are embedded effectively to structure our governance arrangements, so that our quality of provision and education is of a consistently good or better quality and that our apprentices and employers experience a good service from us. All board members are trained in Safeguarding and Prevent to L3 standards, dependent on their role and responsibility within DLS and are provided with regular updates in accordance with changes in legislation. Board members also receive regular updates and training focusing on aspects of Prevent, equality, diversity, and fundamental British values in order that our board are current and up to date with sector regulatory and KCSIE requirements as expected within the sector.

Board meeting minutes provide the required level of detail, robust challenge identified with clear actions linked to each owner and target deadlines for effective completion with impact on our apprenticeship provision and allows for scrutiny, analysis, and challenge to ensure that our employer partnerships are successful and continue to grow and be sustained. This allows for more highly effective swift actions, monitoring process of progress, culminating in maximum positive impact on apprentice's achievement rates and positive apprentice and employer satisfaction.

6. Employer Partnerships and Engagement

The growth achieved by Davies Professional Education during the last 6 years has been supported by our well developed and long-established successful relationship with each employer and range of specialist partners within the Financial and Insurance Services sector. The Operating Board take their role very seriously in shaping the influential apprenticeship standards and key members are involved in the Trailblazer reviews for Insurance and several of the other apprenticeship standards in our product suite. For example, Level 3, 4 and 6 Insurance Standards, relevant employer partners within the sector helping to shape and inform structure and content of each standard and level through input into the Insurance Apprenticeship Taskforce group, founded by Davies Professional Education.

The Consulting Director is also a member of the IfATE Legal, Finance and Accounting Route Panel (tenure 2023-2026) to ensure the future goals and aspirations of employers in the sector help shape the range of apprenticeships on offer in the Route Pathway.

Davies Professional Education works closely with its employers to shape bespoke successful apprenticeship standards that meets the needs of apprentices, employers, their workforce, and sector needs. As a result, we provide an effective, flexible curriculum and delivery model for each apprentice that is tailored to their starting baseline point, job role, knowledge and professional skills required by the sector in which they work and that will meet employer needs. By working in close partnership with each employer and inputting into the design/revision of apprenticeship standards in our sectors, we can ensure we have a maximum impact on each apprentices' timely progress in their specific professional skills and technical knowledge towards successful achievement of their apprenticeship.

We have a close working relationship with AELP through the membership of our Vice President and Curriculum Director. We also maintain close relations with key stakeholders in Skills development, such as the Professional Qualification awarding bodies; CII, ICA, CBI, CILA, the ABI and Financial Services Skills Commission. The Operating Board actively seek out influential relationships to maximise the impact of required changes or enhancements to apprenticeship standards.

Our curriculum offer has been carefully considered by our leadership team and well planned with a clear focus on the Financial Services and Insurance sectors. This allows us to develop and invest in our delivery offer and model, particularly with a significant investment in the quality of education for each apprentice, underpinning support including a widening range of sector specific learning and research resources new MIS platforms and online apprentice resource and continuing our focus on further developing our quality of education, Teaching, Learning and Assessment, behaviour and attitudes and personal development. This all facilitates the sustainment of our high-quality provision and potentially outstanding outcomes for our apprentices. An example of this is the investment in our LMS, Thrive Professionally with Davies, along with the continued development of the ePortfolio and MIS platform, Aptem. This has had a positive and effective impact on improved recording, tracking, and monitoring of each apprentices' progress, including the opportunity for apprentices to broaden their research skills and building on underpinning knowledge and efficiently gather information, and work independently whilst engaged in both on and off-the job training and their remote learning and work.

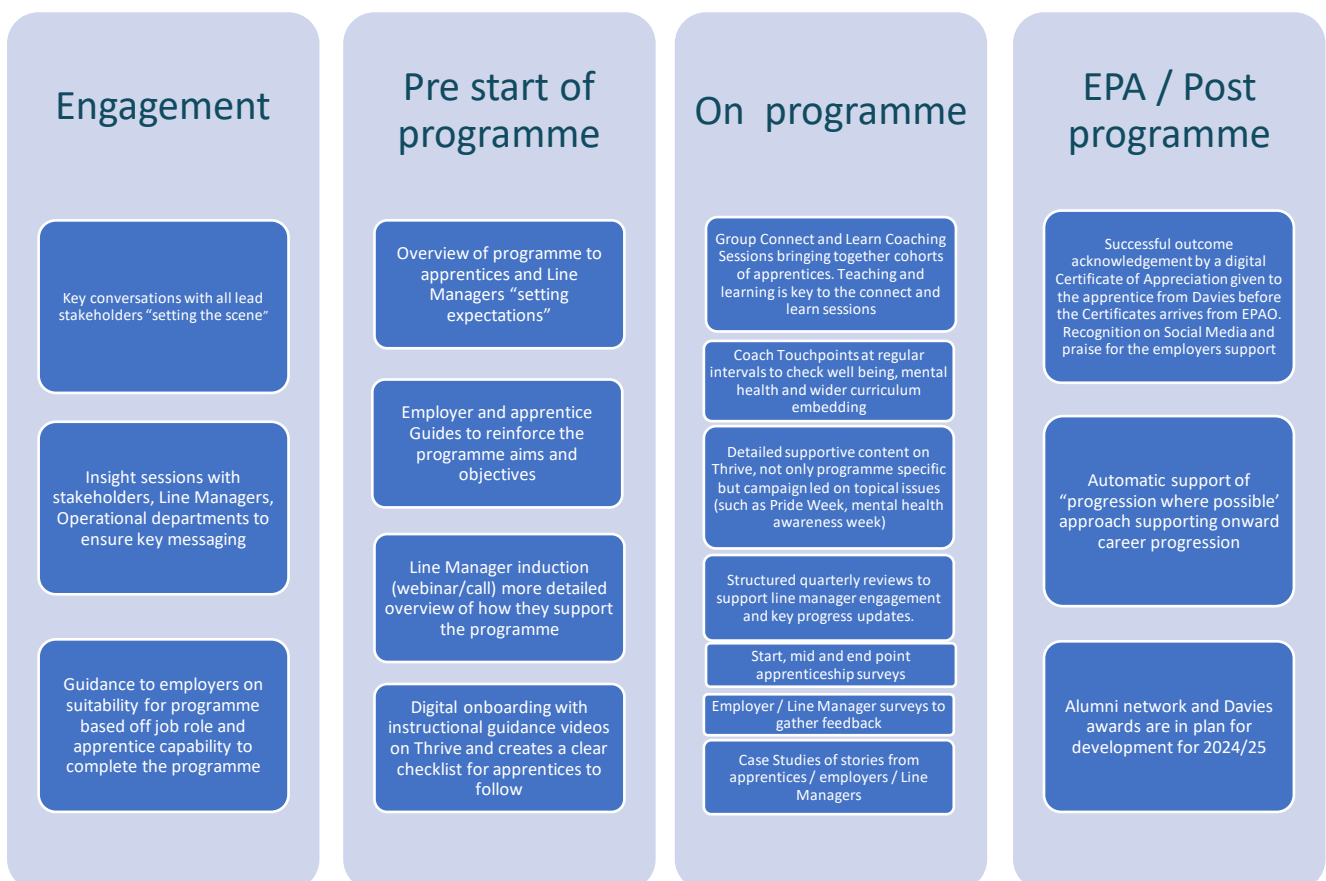
Davies Professional Education created an 'Insurance Apprentice Taskforce Group', which is formed of our key employer representatives. Membership of the Steering group includes Marsh McLennan, Zurich and WTW, some of the largest global insurance and financial services world ranked employers. The aim of this Taskforce Group is to foster and gather viewpoints, insight and validation from our employers and apprentices to support and help shape the direction of apprenticeships within the sectors in which we work and deliver to. Key employers were invited to be part of the Taskforce Group and each year a cohort of apprentices are gathered to gather a cross section of viewpoints. The aim is

to create Apprentice groups led by a Steering Group sponsor which tackle areas and report back to the Steering Group with their findings. The Steering Group then consider the finding and decide from the findings/recommendation which points to take forward to drive improvement. The Taskforce has been running for 3 years with different topics being reviewed by Apprentice Taskforce members.

Further evidence of employer engagement can be found in our Line Manager Engagement Plan, Line Manager Guide and Line Manager Induction pathway hosted on our LMS Thrive. Each line Manager of an apprentice is encouraged to undertake the learning pathway, so they are prepared to manage and support their apprentices on programme through to completion. Our intent is to strengthen our employer relationships and engagement with each apprentice line manager throughout the whole apprenticeship learner journey. As a result of our work, we can ensure that we are able to provide a positive apprentice experience in the development of substantive new technical sector specific knowledge and underpinning professional skills, help each apprentice to achieve high outcomes and make excellent progress towards their specific career aspiration/s.

A significant factor in the success of our apprenticeship provision and working with our apprentice cohorts and each employer is our effective engagement strategy, communications and positive relationships built between all three parties, the apprentice, the Davies coach, and the employer line manager. These characteristics of our success in sustaining our positive and breadth of our client relationships are all fundamental in the work that we do with each employer and integrated in our new CRMS and working protocols.

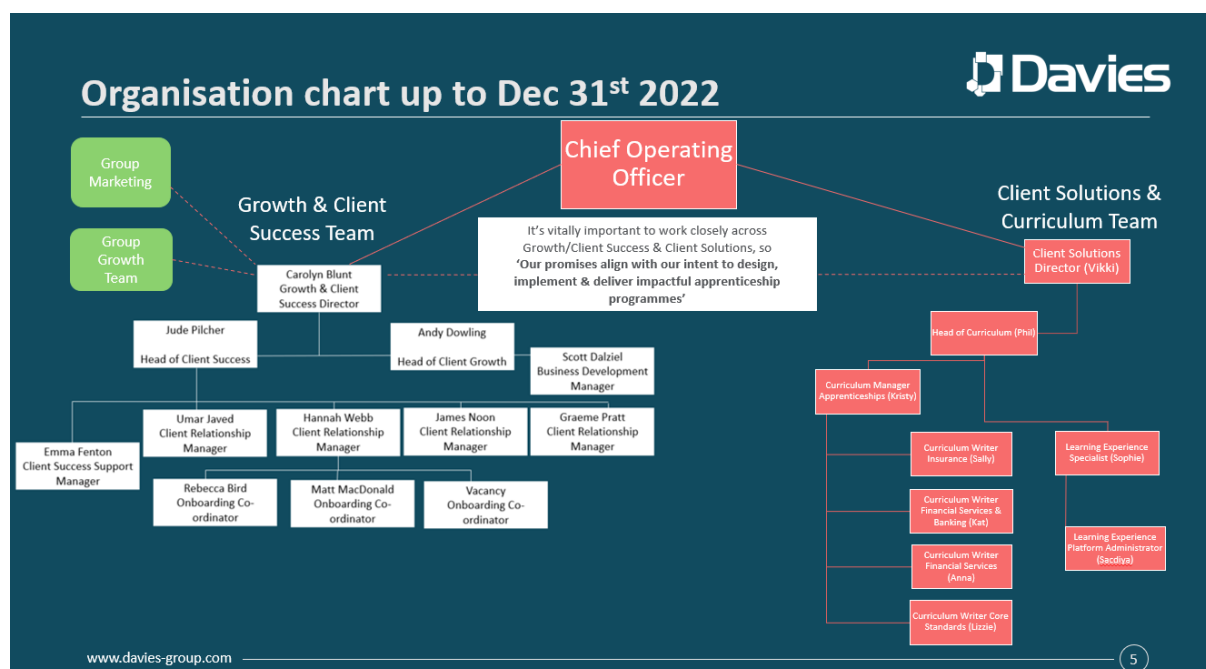
As a result, we can structure each apprenticeship learner journey effectively from the beginning and efficiently manage the apprentices' and employer's expectations, clearly define the apprenticeship requirements confirm the apprenticeship commitment statement, agreeing to and signing to the apprentice training entitlement. Please see the following graphic for an overview of this approach.



7. The evolution of the Client Success and Solutions Team

As we continue to expand the Client Success and Solutions Team, we have had to evolve in our structure for us to continue and further strengthen our proactive employer engagement, communications and relationship building activities with our employer partnerships. In July 2021 the team was restructured after the formation of the new Operating Board. The Client Relationship Managers were aligned under the Growth & Client Success Director and the Curriculum team was aligned under the Client Solutions Director.

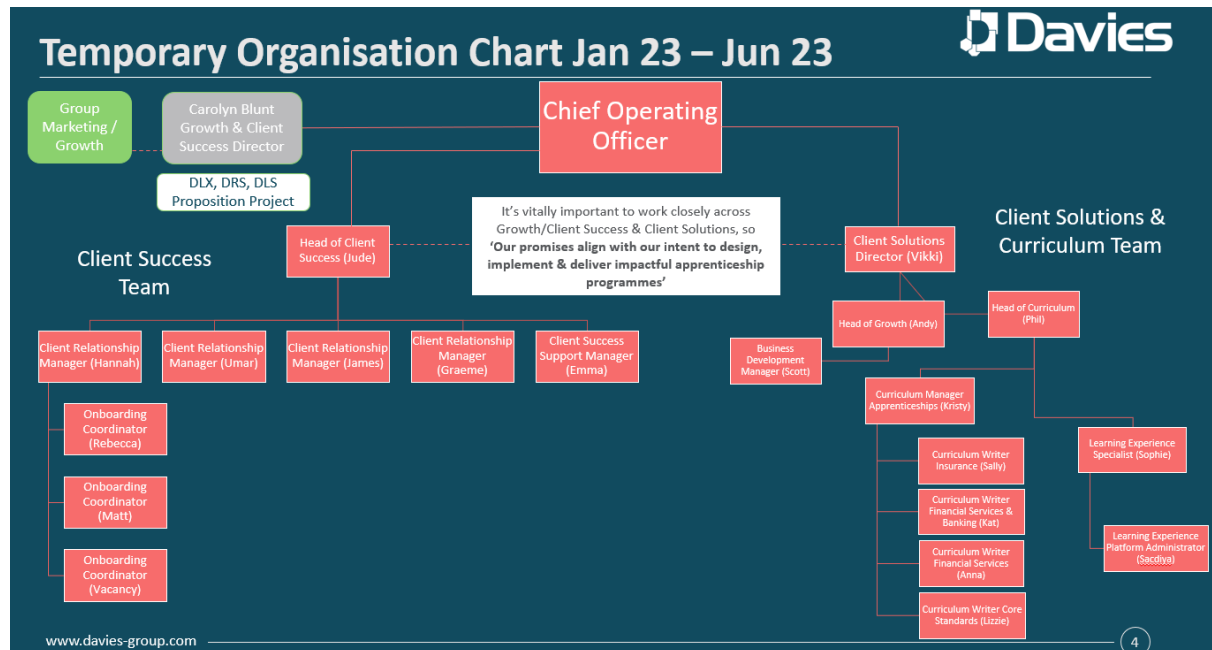
The below organisation chart for the team shows that to support Client Success, Onboarding was brought into the team structure. This is to improve the initial interactions that Employers and Apprentices have with DPE, to ensure apprentices are suitable for programme through a stringent onboarding team which sits closely aligned with the Client Relationship Managers.



The aim of the reorganisation was to allow for closer alignment to Growth and Client Success/Client Solutions and Curriculum development strategy aligned to the growth targets of the business. To develop stronger curriculums and provide robust, impactful learning both Client Solutions and the Curriculum team need to be close to the Growth and Client Success team and vice versa. The organisation chart and graphic below shows the Client Solutions/Curriculum and Growth and Success Relationship.

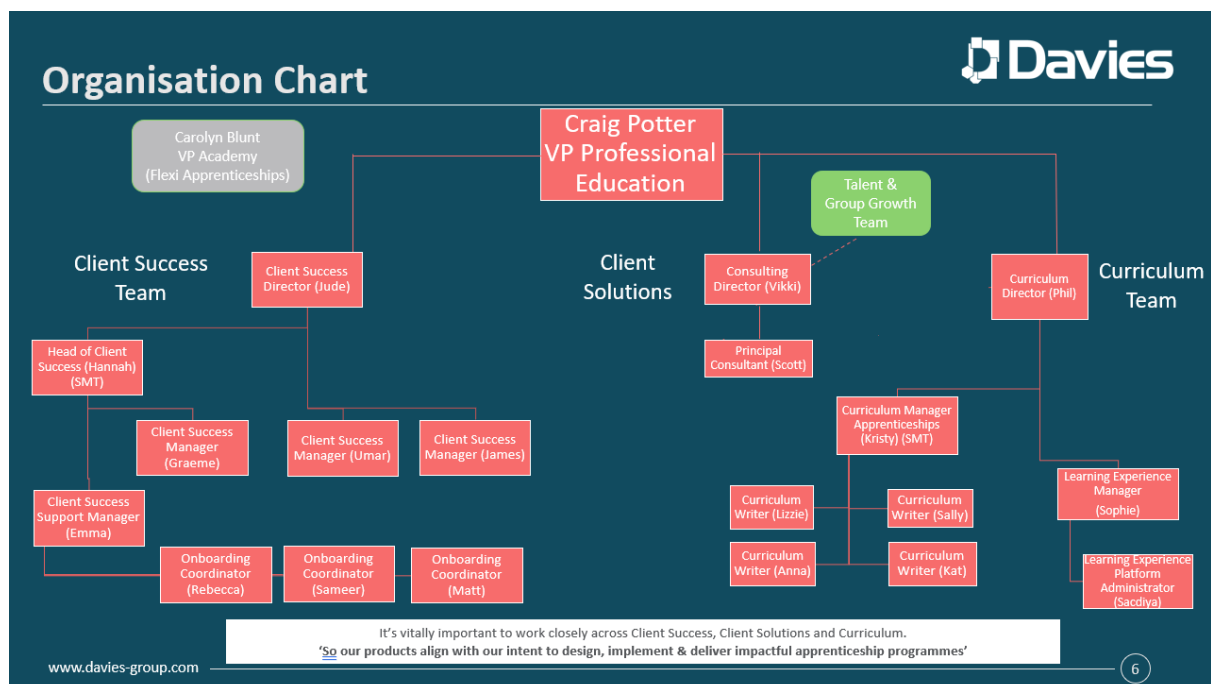
From January 2023 due to an internal project the Growth and Client Success Director was moved to undertake a Group Project role to align the Talent proposition across Davies Resourcing, Davies Learning Experiences and Davies Learning Solutions (this concluded on the 30/6/23 with the formation of Talent Solutions as explained in Section 1). This Project allows us to work in a much more joined up way with a cohesive offering allowing clients to benefit from end-to-end support for their Talent Development needs. During Jan23- Jun23 the Client Solutions Director (now Consulting Director) supported and managed Business Development part of Growth and Client Success.

Please see the temporary organisation chart below to explain the changes in responsibility for Head of Client Success and Client Solutions Director.

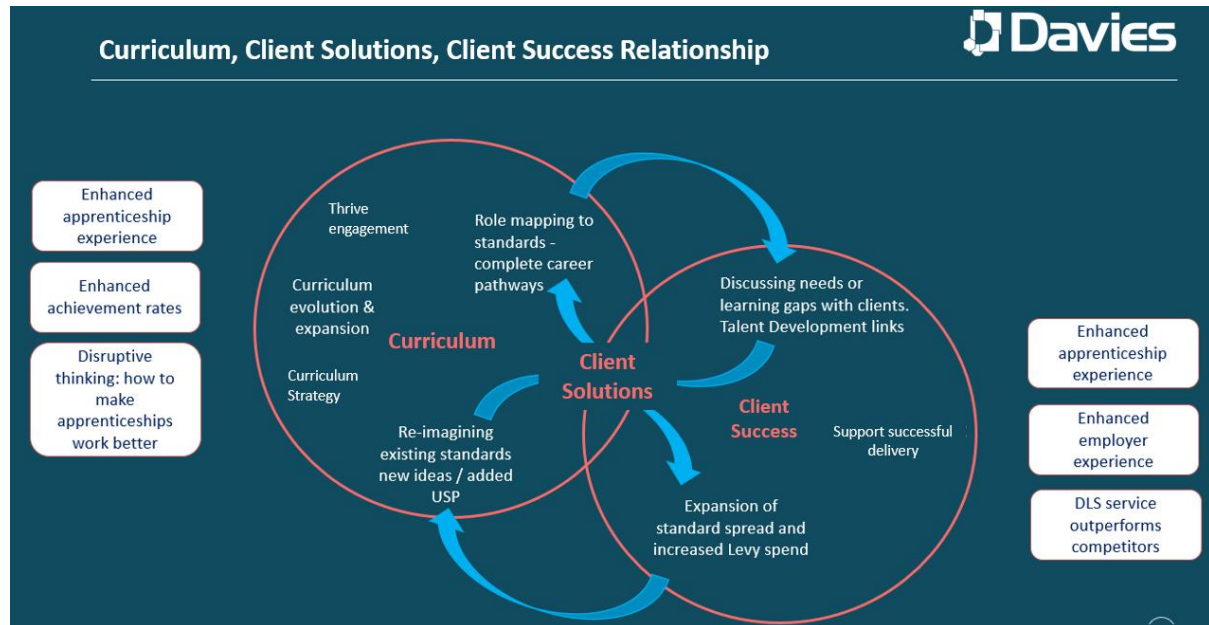


At the conclusion of the Talent Solutions Project the team structure has now been finalised and has been updated to the below. Key things to mention are the clear distinction between the teams, but we maintain a close working relationship to ensure a consistent implementation and lasting impact.

- Curriculum
- Client Success
- Client Solutions
- Davies Academy – FJAA



Our employer and apprentice engagement hinges from the linked relationships, this can be seen in the relationship chart below.



Please refer to the Curriculum strategy document for full detail of our curriculum team, our intent, implementation, and impact of our curriculums.

[Curriculum Strategy 2324.pptx](#)

8. 2023/24 communication planning as Talent Solutions

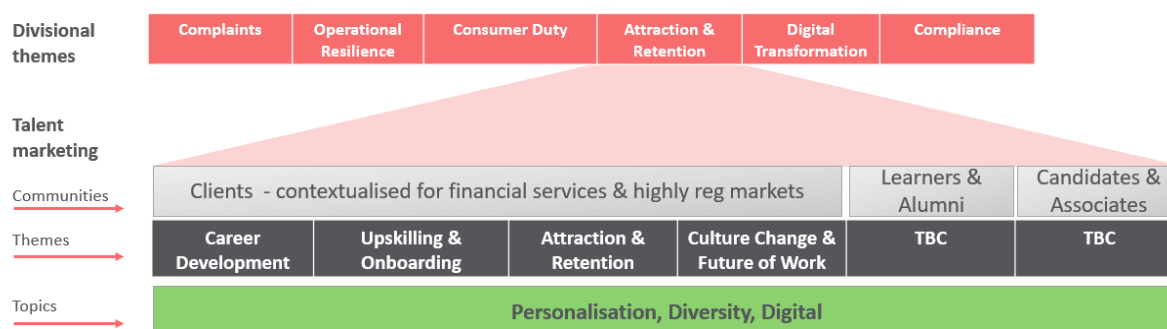
As a result of the alignment project undertaken in Jan23-Jun23 there is now a joined-up strategy which stretches across Davies Talent Solutions with 1 key aim and 6 key milestones:

6-month project to unify our Learning & Resourcing capabilities as Davies Talent

- Structure our capabilities
- Define our narrative.
- Create new website with refreshed content.
- Align social channels (LinkedIn x 2 Twitter x 2)
- Shape FY24 Marketing budget, strategy, and content plans
- Utilise Bullhorn as full CSM and email campaign tool.

Talent Marketing Strategy - aligned with division

- Following the launch of the new Talent site the 2 existing LinkedIn channels will be merged into one Talent channel. (Twitter has already been rebranded to Talent Solutions)
- Marketing campaigns on LI and email will be planned around key Talent themes.



50% of campaigns and events will be driven by themes/topics and the remainder will be local and responsive campaigns.

As part of our wider sector engagement, we work with a number of strategic partners including the CII, the ABI, BIBA, iCAN, Greater Birmingham & Solihull Chamber of commerce – we have included the current Stakeholder Map below for reference. In addition, the Professional Education Vice President is a member of the Chartered Insurance Institute Educational panel and the Consulting Director is a Route Panel member for the Legal, Finance & Accounting Occupational Route.

Name	Overview
Birmingham & Solihull Chamber	Network of over 15,000 businesses and 3rd largest Chamber and has 39 Patrons
UCAS	Universities and Colleges Admissions Service. Independent charity big investment into Apprenticeships
Calderdale College	Manage Northern Apprenticeship Hub through LEP
Royal Marsden NHS Trust	Centre of excellence with an international reputation for groundbreaking research and pioneering the very latest in cancer treatments, technologies and education.
Cov & Warwickshire Champions	C&W Champions unites businesses and organisations across the region in a powerful network to help develop and promote Coventry and Warwickshire LEP priorities
West Midlands Combined Authority	The West Midlands Combined Authority (WMCA) is twelve local authorities and three Local Enterprise Partnerships (LEPs) working together
ABI	The ABI is a trade body that represents the insurance industry
BIBA	BIBA membership includes around 1800 regulated firms, employing more than 100,000 people
Worcestershire Growth Hub	Part of Worcestershire LEP - Apprenticeship focused
Hemsley Fraser	Learning & talent development provider offering managed service
ICA	The International Compliance Association is the leading professional body for the global regulatory and financial crime compliance community
DSW	Training and assessment organisation
BCS	Chartered Institute for IT
CII	Chartered Institute for Insurance and it's regional institutes
Solihull College	School leaver and University level courses

9. Overall 2023/2024 Strategic Aims

As Davies Talent Solutions we will aim

- Ensure Commercial Viability in our Professional Education Product Suite through market and client insight and horizon scanning.
- Continue to create, build, and maintain brilliant relationships across the Sector, with colleagues and with our employers.
- Maintain and grow repeat business from our employers.
- Increase and maximise our digital capability through key partnerships.
- Think about Talent Solutions as a total proposition rather than working in Silo's.
- Work out where we can increase revenue through reciprocal channel Sales and leveraging relationships.
- Embrace, embed, and live the Davies Values.

Please refer to the 23/24 SAR for our strategic aims [Davies Learning Solutions - Self Assessment Report - 2023-24.docx](#)

10. Leadership & Management Client Success

Leadership of the team is governed by the Client Success Director who sits on Operational Board and reports into the Vice President Professional Education. The agreed objectives across the leaders and team members are aligned to the strategic objectives for the organisation with clear measurement of success set out, such as improvements in qualification achievement rates, attendance, retention and employer/apprentice satisfaction outcomes and net promoter scores.

Client Success Objectives

Proactive Account Management – Develop relationships with clients to achieve mutual success

Risk Mitigation – delivering strengthening of Governance and controls

Celebrations – recognise and motivate others and us as a team

Continuous Improvement – creating a positive energy and engagement with Clients using our expertise

Collaboration – work together with colleagues to deliver for Davies

There are weekly Team Meetings for both the Client Solutions Team and Client Success team to monitor progress, track issues and to update the Team with relevant priorities and actions. The team also have an end of week touchpoint which includes Curriculum to track actions and provide updates/give focus for coming weeks.

The Head of Client Success reports into the Client Success director and acts as Chair of the Senior Management Team (SMT). This role provides support with operational implementation and improvements. There are bi-weekly meetings with the SMT to monitor progress against the Quality Improvement Plan and any other operational solutions.

11. Leadership & Management Client Solutions

Leadership of the team is governed by the Consulting Director who sits on Operational Board and reports into the Vice President Professional Education. The agreed objectives across the leaders and team members are aligned to the strategic objectives for the organisation with clear measurement of success set out, such as improvements in qualification achievement rates, attendance, retention and employer/apprentice satisfaction outcomes and net promoter scores.

There are weekly Team Meetings for both the Client Solutions Team and Client Success team to monitor progress, track issues and to update the Team with relevant priorities and actions. The team also have an end of week touchpoint which includes Curriculum to track actions and provide updates/give focus for coming weeks.

12. The local economy, employers and skills needs

Apprenticeships continue to be a central in the Government's Skills Policy. The introduction of the Apprenticeship Levy in May 2017 radically changed how apprentices in large organisations are funded, with the employer very much in the driving seat. The former Skills Minister, Anne Milton, previously acknowledged that the apprenticeship levy and the funding changes for non-levy paying employers has had a significant impact on the number of apprenticeships starts since the policy was introduced.

Davies Professional Education also takes in to account the wider Route Panel review for Legal Finance & Account published in June 2023 [Legal, Finance and Accounting Route Review / Institute for Apprenticeships and Technical Education](#) which pulls out some key highlights which all inform our intent for our programmes, shapes our delivery mechanisms, structures our employer and apprentice engagement and conversations.

Key highlights are listed here for ease but can be read in full in the above hyperlink.

- Over 90 businesses fed into the first review of this Route.
- Employer insight underpins 9 new principles and characteristics. These apply to the following in the legal, finance and accounting (LFA) route:
 - occupational standards
 - apprenticeships end-point assessments
- There is high satisfaction among legal apprentices. Employers tell us we need to do more to educate young people and schools on the value of apprenticeships. But the dial is moving.
- The following skills are essential for future LFA professionals: -
 - digital literacy
 - data analysis
 - sustainability
 - "soft" skills
- Apprenticeships and technical education will embed the digital skills LFA professionals need.
- Employers are embracing apprenticeships. Evidence shows they improve equity, diversity, and inclusion in LFA sectors.
- Apprenticeships of the future will embed regulatory and professional body qualifications. This helps to reduce burden on apprentices. It highlights IfATE commitment to ensure apprenticeships are fit for purpose.
- IfATE to launch regular legal, finance and accounting stakeholder forums.

As of May 2023, over 30,000 learners achieved one of the 40 apprenticeships on offer in this route. These range from level 2 to level 7. Most of the standards offered by Davies Professional Education sits within this route panel. This is apart from 3 standards: Junior Management Consultant, Sales Executive and Business Administration.

As our Consulting Director is a member of the LFA Route Panel the input and impact of change is organically fed in at Operating Board level and allows us to act quickly upon recommendations, suggest key changes or updates to standards voiced by our employers and in doing so we support IfATE with their key priorities.

Davies Professional Education also listens to and takes onboard the key viewpoints from across the sector in particular the Financial Services Skills Commission or FSSC. The Financial Services Skills Commission (FSSC) is an independent, not for profit, member-led body, representing the UK's financial services sector on skills. The FSSC works directly with the sector to ensure that businesses have the talent and skills they need for the future. The FSSC has over 30 members, representing more than 300,000 employees across all parts of the sector and all the UK's regions and nations.

In a recent update to their 2022 report [FSSC Financial Services Skills Commission](#), the FSSC have recently conducted a detailed canvassing of its members and identified 13 future skills which are essential to the Financial Services Sector. These include:

- Data analysis and Insights
- Digital Literacy
- Software development
- Cyber Security
- User Experience
- Machine learning / AI
- Adaptability
- Coaching
- Relationship Management
- Agile thinking / project management
- Creative thinking
- Empathy
- Teamwork

Davies Professional Education look to include key knowledge skills and behaviours related to the KSBs of the standard and what is required in a financial Services / Insurance Employer.

The recommendations of the FSSC:

- Business leaders should ensure skills are a strategic business priority, championing skills forecasting and upskilling/reskilling as the foundation of overall business success.
- Skills forecasting practices should be further developed in all firms, so it becomes an essential component of each business planning cycle and provides the necessary clarity on skills needs, including:
 - considering how strategic drivers such as sustainable finance and customer-centricity drive changes in skills needs across the business,
 - understanding how changes in roles and skills affect different groups in the workforce and prioritise reskilling these individuals,
 - firms are invited to share insights on skills needs with the Financial Services Skills Commission to support an industry-wide view of skills needs.

Firms should **continue to build future skills, through investing in meaningful upskilling and reskilling programmes** and enabling all colleagues to augment their skills through dedicated time for learning and a supportive learning culture. Where possible, develop and share innovative approaches to building skills to understand what works best.

These recommendations are closely matched to the strategic aims of apprenticeships and bootcamps of which Davies Professional Education are a key provider.

13. Our overarching statement of intent:

At Davies Professional Education we are committed to:

- Continue to strengthen Quality of Education to a consistently high level by effective, targeted & structured CPD and embedding delivery models.
- Evolve our delivery to be a digitally enabled training provider using technology to benefit the needs of employers and learners.
- Continue to work on improving apprentice's retention and achievement, work closely with employers to develop a strategy so that apprentices stay and successfully complete their apprenticeship in a timely fashion.
- Streamline our product portfolio to a manageable number. Ensuring a focus on the quality of our offer over the quantity of the programmes we offer
- Further develop the Davies (Professional Education) English, maths, and digital skills strategy so that all apprentice's literacy and numeracy skills continue to be developed beyond existing levels.
- Embed our wider curriculum into a learning journey supported by regional content that can be used to contextualise learning on British values, Prevent, Safeguarding, Mental Health and Sexual Health and Wellbeing
- Reduce early withdrawals by adding value to the learning experience in the support of long-term career development.
- support apprentices to develop the right behaviours, work ethics, codes of conduct, good punctuality for and regular attendance at work, which meets sector and employer expectations.
- Support apprentices in developing the right personal and communication skills, a sense of responsibility, confidence, motivation, and self-esteem through good or excellent coaching strategies used by coaches that are flexible and meet each apprentices' needs, style of working and learning.

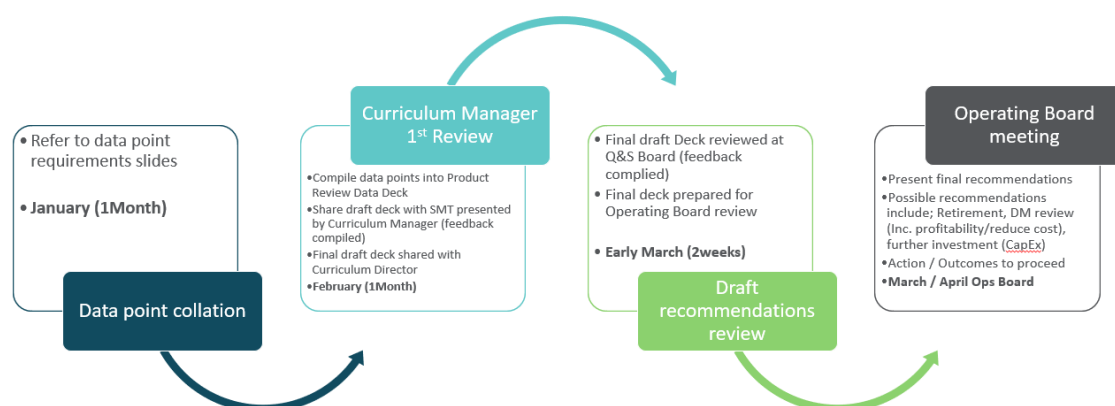
14. Employer Profile, intelligence and LEP Priorities

By being fully engaging with the national, regional, and local LEP and employer business growth priorities for the Financial Services sector, Davies Professional Education have shaped its provision to maximise the impact it can have across the sector, country and for the individual apprentice and employer.

We have recognised a need to streamline our standard programme portfolio whilst we assess the outcomes of standards going under a periodic review. In this academic year we will look more towards the financial services sector through Counter Fraud, Financial Crime and Junior Management Consultant rather than Financial Advisor and Paraplanner apprenticeships, as these are going through a significant review with IfATE at present (Jul23).

To understand how we review our product portfolio please refer to the graphic below. Annual reviews are started in January of each year. Whilst an ad-hoc review may be conducted at any one time on standards which may not be performing as expected or when new standards are approved for delivery which Davies Professional Education wish to offer to our Employers.

Existing and new product review - Process flow



Enabling growth across the UK 2023 – UK-based financial and related professional services – source TheCityUK report September 2023

- Nearly 2.5 million people worked in financial and related professional services across the UK
- This represents 7.6% of the working population or approx. 1 in every 13 jobs.
- This is roughly equivalent to the entire populations of Birmingham, Glasgow, Edinburgh, and Cardiff combined.
- Two thirds of people in employment in the industry work outside London.
- Major UK centres with more than 30,000 in employment in financial and related professional services include Birmingham, Manchester, Edinburgh, Bristol, Glasgow, and Leeds
- Overall, 23 towns and cities in the UK towns and cities in the UK each have more than 10,000 people in employment in the industry.

Please see the table below that shows the breakdown of the nearly 2.3 million people in employment across the regions within the UK in 2021:

Region	Total financial and related professional services
London	786,000
South East	270,000
North West	263,000
South West	185,000
East of England	166,000
Scotland	153,000
Yorkshire & the Humber	142,000
West Midlands	127,000
East Midlands	95,000
Wales	69,000
North East	50,000
Northern Ireland	37,000
Total	2,343,000

Davies Professional Education has clear intent to drive and support the attraction and development of diverse new talent and the continued upskilling of existing talent across all key regions of the UK, with a focus on the hub in London but then also having maximum impact across the other key financial service centres in the UK.

Davies Professional Education is achieving strong early impact, and this is evidenced by the alignment of apprentice recruitment to the identified key regions such as London, South East, Birmingham and Manchester. In addition to this, Davies Professional Education has apprentices in 35 out of the 38 LEP regions demonstrating the impact they are having across all geographical areas of the sector.

The table below outlines the breakdown of apprentices in learning across the different LEP regions up to and including 9th March 2022.

LEP Region	Number of apprentices in learning	Percentage
Black Country	33	2.11%
Buckinghamshire	22	1.40%
Cheshire and Warrington	21	1.34%
Coast to Capital	26	1.66%
Cornwall and Isles of Scilly	5	0.32%
Coventry and Warwickshire	12	0.77%
D2N2	9	0.57%
Dorset	14	0.89%
Enterprise M3	98	6.25%
GFirst LEP	31	1.98%
Greater Birmingham and Solihull	19	1.21%
Greater Cambridge and Greater Peterborough	17	1.08%
Greater Lincolnshire	7	0.45%
Greater Manchester	18	1.15%
Heart of the South West	9	0.57%
Hertfordshire	32	2.04%
Humber	6	0.38%
Lancashire	29	1.85%
Leeds City Region	72	4.59%
Leicester and Leicestershire	13	0.83%
Liverpool City Region	17	1.08%
London Enterprise Panel	391	24.95%
New Anglia	66	4.21%
North East	26	1.66%
Oxfordshire	10	0.64%
Sheffield City Region	4	0.26%
Solent	7	0.45%
South East	457	29.16%
South East Midlands	16	1.02%
Stoke-on-Trent and Staffordshire	29	1.85%
Swindon and Wiltshire	10	0.64%
Thames Valley Berkshire	15	0.96%
The Marches	2	0.13%
West of England	12	0.77%
Worcestershire	10	0.64%
York and North Yorkshire	2	0.13%
Grand Total	1567	100.00%

Davies Professional Education is a specialist provider and currently the Standards Portfolio is outlined below; we have categorised our standards into insurance and financial services. It must be noted that Davies Professional Education chose to put Operations Department Manager level 5 and Team Leader level 3 in to Run Off from April 2023. We chose to exit from these standards due to the saturation of competitors in the market and commercial viability to deliver a high-quality programme against the restrictions of the DoFE Funding Band. You will also note that some standards are repeated in Insurance and Financial Services, this is due to the programmes being specifically tailored for those sectors.

Sub sector area	Apprenticeship offer
Insurance	<ul style="list-style-type: none"> • Level 3 Insurance Practitioner • Level 3 Financial Services Administrator • Level 3 Senior Financial Services Customer Adviser • Level 4 Junior Management Consultant • Level 4 Counter Fraud Investigator • Level 4 Insurance Professional • Level 6 Senior Insurance Professional
Financial Services	<ul style="list-style-type: none"> • Level 3 Financial Services Administrator • Level 3 Business Administrator • Level 3 Senior Financial Services Customer Adviser • Level 3 Compliance / Risk Officer • Level 4 Junior Management Consultant

All programmes can be read about in further detail on our website:

[Professional Education \(davies-group.com\)](https://www.davies-group.com)

Please refer to the 23/24 Curriculum Strategy for a full breakdown of employer profile, LEP, Sub sectors and intent.

[Curriculum Strategy 2324.pptx](#)

15. Client Success Team Responsibilities, Objectives and KPI's

What the Client Success team does:

Client Success (Client Success Director, Head of Client Success, Client Support Managers, Client Support including Onboarding):

Responsible for onboarding Pipeline Management (Ops Board & SMT) Employer / Line Manager engagement strategy (Ops and Q&S Board)

- Meet the expectations set by Solutions / Business Development for the delivery of the programmes
- Client satisfaction surveys/feedback & success case studies
- Grow client standards footprint and client spend through apprenticeship starts.
- MI reporting / employer support / Complaints
- Cross working with Curriculum / Onboarding / Delivery / Client Solutions & Growth
- Onboarding pipeline management and oversight

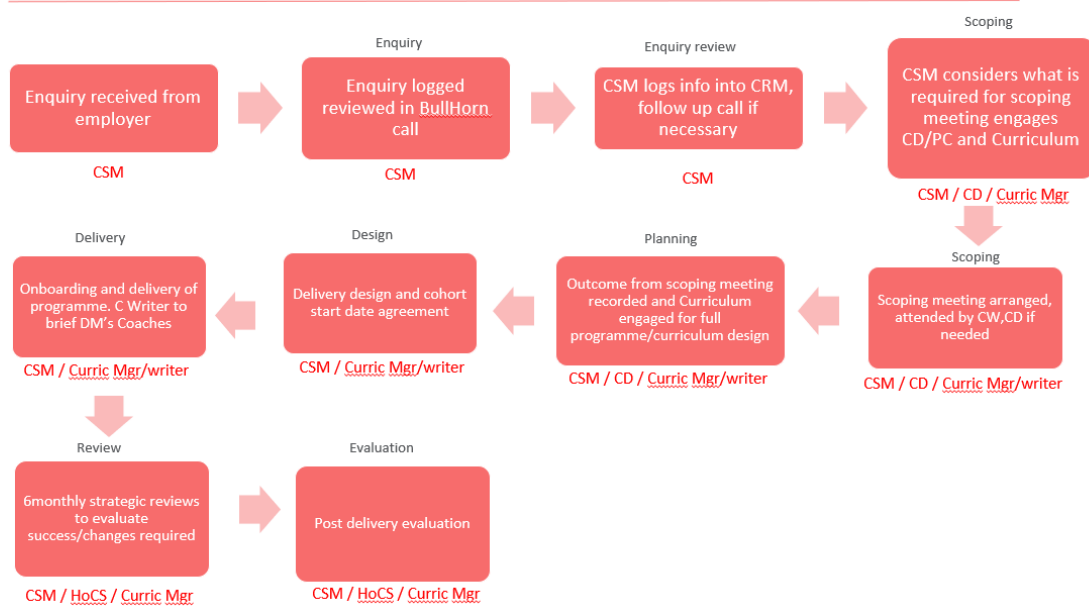
Role	Description / examples of activity
Client Success Director	<p>The Client Success Director is a board level role which involves strengthening our existing and new client partnerships and relationships. Working closely with the Consulting Director to achieve sustainable growth across all income streams.</p> <p>This position plays a vital role as the Talent Division of Davies continues to grow. It is essential that we continue to exceed our client expectations, secure ongoing repeat business, diversifying to grow existing client's utilisation of Davies and support new client tender opportunities.</p> <p>In this board leadership role, they are expected to drive a working environment which encourages teamwork, energy, and creativity. They will act as a role model and be focused on achieving results to meet Business Plans and deliverables, and ideally in the FE and Skills or Learning and Development sector. They will be able to make an immediate impact across all areas of the business. They will have strong leadership qualities whilst at the same time have the attention to detail required to understand the business performance.</p>
Head of Client Success	<p>This role will sit within our Client Success team and they are required to implement the Client Success strategy and lead on the promotion of key themes each month within existing client accounts.</p> <p>The main goal is to retain and expand client accounts and portfolio by strengthening client relationships and exceeding monthly Apprenticeship start targets.</p> <p>The Head of Client Success will be responsible for ensuring that the team reach or exceed start targets whilst providing impartial and accurate information, advice, and guidance to the Client Success Managers to resolve difficulties and keep clients informed.</p> <p>The Head of Client Success will also be responsible for managing the client support team and overseeing the processes that this team is responsible for e.g. effectively onboarding new apprentices on to programme.</p>

Client Success Managers	<p>The Client Success Manager meets with client stakeholders regularly to discuss Management Information including Learner progress, deal with any issues and work to maximise the successful completion of individual apprenticeships, avoiding withdrawals and breaks in learning as much as possible. They will work to build close relationships with clients to retain and grow accounts. The candidate will implement the Growth & Success strategy and promote key themes each month within existing clients accounts with the goal of maximising our monthly Apprenticeship start targets across England, drawing on our existing client base and helping to attract new clients where possible. The Client Success Manager is responsible for ensuring that they reach or exceed starts targets by sourcing Learners in conjunction with the client and working with the Consulting Team. They provide impartial and accurate information, advice, and guidance to clients to ensure compliance with funding rules and Ofsted performance and keep clients informed of internal and external changes affecting apprenticeships. They have a hunger for sales and seek opportunities to offer commercial opportunities alongside successful apprenticeship delivery.</p>
Client Success Support Manager	<p>This role sits within our Client Success team and is required to support the wider Client Success Team. They assist with updating systems, tracking contracts, producing reports, planning meetings, and creating documents in Microsoft PowerPoint, Word and Excel, all with the goal of maximising our monthly Apprenticeship start targets across England and maintaining client satisfaction to retain learners. The Client Success Support Manager also supports the Client Success Managers to manage escalations and communications. Support will also be provided to the Client Solutions team by liaising with the Group Marketing team to contribute content to brochures, webpages, case studies, bids and award submissions, email marketing campaigns and social media posts.</p> <p>The Client Success Support manager will also have responsibility of managing the Client Success Support team; identifying and implementing opportunities for process improvements and personal development.</p>
Client Success Support Lead	<p>Leads day to day contact with apprentices and operational set up of the programmes and onboarding of apprentices.</p> <p>Pipeline/forecasting management, enrolment escalations, compliance/quality audit and capacity management</p>
Client Success Support Coordinator	<p>To work as part of the Client Success team liaising with account managers, clients, and potential apprentices to ensure a smooth start of training experience. Provide independent advice and guidance to potential apprentices where there are concerns about the suitability of the course they have applied for and make appropriate recommendations to ensure all apprentices enrolled have a good chance of completing the full course.</p> <p>Co-ordinate the process to ensure Pre-induction forms are processed timely and prospective learners are guided, checked, and chased as appropriate through the entire onboarding process until their first date in learning when they are passed over to delivery. Work closely with the compliance team to ensure learners are compliant at each stage of the process.</p>

16. Client Success Employer Management and Process

Existing Employer and Line Manager Engagement Process

Existing Employer Journey



From start to finish, we provide our clients and apprentices with the necessary information for a successful Apprenticeship Journey. We offer our Free Basic Recruitment service at the initial stage of interest guidance to Employers on how to attract and retain talent.

Once an apprentice has been recruited, we ensure they attend our Insights session so that they are aware of what the apprenticeship involves at a high level. When we know which programme they wish to join, we provide a programme overview (below is just one example of this) covering the detail that relates to their specific programme and our Onboarding Infographic, making the Apprentice and Line Manager aware of the next steps in the process.

Once onboarded, all apprentices attend our First Day in Learning Webinar where they work with one of our expert tutors to navigate our E-learning Systems and complete their first learning activity.

- [Davies - Attracting and retaining talent brochure](#)
- [Davies Talent Solutions Free Basic Recruitment Offer](#)
- [Insurance and Financial Services Insights Session](#)
- [L3 Insurance Practitioner Programme Overview](#)
- [Learner Onboarding Infographic](#)
- [First Day in Learning - Welcome to your apprenticeship](#)

We have also created new collateral to support Employers and Line Managers. These include:

- [Davies Talent Solutions \(davies-group.com\)](https://davies-group.com)
- [Financial Crime Practitioner \(C+RL3\) Flyer](#) (example of Flyer for Compliance and Risk L3, these are available for each standard we deliver)
- [Levy and Non-Levy Employer DAS Guide](#)
- [Levy Transfer DAS Guide](#)
- [Employer Guide 2023](#)
- [CII Employer Guide](#)
- [Line Manager Overview of Apprenticeships](#)
- [Functional Skills Guide](#)
- [Off-The-Job Guide](#)
- [Compliance and Risk Officer Level 3 - Crib Sheet](#) (example of Crib Sheet for Compliance and Risk L3, these are available for each standard we deliver)

The Guide for Line Managers can be found here:

[Line Manager Guide | DLS Learning](#)

To further enhance the support for the Line Managers and to reinforce commitment and setting expectations for completion of apprenticeships (as called out in our 2021 Ofsted report). The Head of Curriculum and Client Solutions Director are creating a Line Manager Learning pathway on Thrive. This will consist of the following and is designed to be completed by relevant line managers who are new to managing an apprenticeship with DLS.

- 6 compulsory modules – blended learning elements (recorded videos, 1 pager PDFs, workbooks)
 - Introduction (20 mins)
 - Onboarding & Learning plan (20 mins)
 - Your Apprentices' Learning (20 mins)
 - Your role as a Manager (20 mins)
 - Maximising learning for business needs (20 mins)
 - Resources to support you (20 mins)

approx. 2 hours in total

Process: Line Manager Pathway

- CRM position LM pathway in LM briefing calls
- Line manager pulled details from Onboarding form, Thrive access set up
- Auto enrolment on pathway when apprentice starts onboarding
- LM has 2 weeks to complete pathway prior to apprentice FDIL activity
- Reported on from Thrive and included in the CRM MI Tracker
- CRM to check in with Line Manager and upsell further learning options if required

In addition, we will be running a series of short, interactive virtual Line Manager sessions throughout 2024 to receive feedback on what is working well for Line Managers, challenges they are facing, impacts and benefits of apprenticeships for Line Managers and improvements they would like to see.

CSM Tools and Tracking

Client conversations and possible opportunities are tracked in three areas depending on which stage in the process they are at. Initial conversations and potential future opportunities will be noted on Bullhorn. CSMs monitor the progression of Bullhorn opportunities by providing updates to the CS team during weekly Success and Solutions meeting. Bullhorn is also used to keep track of client contact information, business location, changes to primary contacts and notes regarding the business (industry they are in, likely programmes etc.) Bullhorn opportunities and any other changes to contacts or clients are then updated following the meeting and any follow-up actions from CSM's are monitored in post-meeting updates shared with the team.

Once further details are known such as confirmed number of apprentices, confirmed programme and dates apprentices are wishing to start programme, these are moved to Work in Progress where the Client Support team will collate all relevant information needed for onboarding purposes and the Delivery team will allocate a coach to each apprentice. When a coach is allocated and Client Support have all necessary information, apprentices are sent out to be onboarded and their progress is manually tracked using an excel document known as Apprentice Approval.

All tracking systems can be found using the links below:

- [Bullhorn Tracking Report](#)
- [Employer Work in Progress](#)
- [Aptem Apprentice Approval](#)

Onboarding Process

Onboarding is broken down into three main stages for apprentices, Stage 1, Stage 2 and First Day in Learning. Internally, this is broken down further to take into account the 'behind the scenes' work that takes place.

Stages of Onboarding

Pre – Onboarding: At this stage, CSM's/BD's should have a signed contract with their client, completed a Programme Overview Call and received a completed onboarding form including having the correct permissions on DAS (or having a DAS cohort reference).

- **Onboarding Stage 1**
 - Eligibility Checks
 - Suitability Checks
 - Functional Skills and Exemptions
- **Skills Radar**
 - Apprentice and Line Manager attendance
 - Understanding if apprentice is on the right programme and level
- **Moving to Onboarding Stage 2**
 - Recognition of Prior Learning (previous qualifications)
 - Funding and programme length reductions
- **Onboarding Stage 2**
 - Apprentice Personal Details
 - Compliance document sign off (Apprentice and Line Manager)
- **First Day in Learning (FDIL)**
 - Run through of Aptem and Thrive use
 - Completion of FDIL Thrive Task and Aptem Component
- **Post- FDIL**
 - Personal to Work Emails
 - DAS Upload
 - Compliance Checks

We have created internal guides and tracking systems to ensure all necessary information is collated and apprentices have the smoothest possible onboarding experience.

- [Full Onboarding Process Flow](#)
- [Onboarding Stage 1](#)
- [Moving to Onboarding Stage 2](#)
- [Onboarding Stage 2](#)
- [First Day in Learning Process](#)
- [Onboarding Escalation Process](#)
- [Employer Work in Progress](#)
- [Aptem Apprentice Approval](#)

Compliance checks

Both during and after the Onboarding process, Apprentice responses and details are checked to ensure they are compliant with Government funding rules.

- [Full Compliance Checks](#)
- [Compliance/Onboarding Escalation Process](#)
- [Compliance Escalation Process](#)
- [Onboarding Ticklist](#)

Client Communication frequency

All clients are internally graded depending on the number of apprentices they have, their level for potential growth and the frequency of which they would like updates on their apprentices. All Gold, Silver and Bronze clients are allocated to a dedicated CSM with help from the CS Team to provide support and updates to smaller clients. The allocation of clients is monitored and updated regularly to ensure the whole business is aware of who is responsible for each client.

- [CSM Account Allocations](#)

Meeting type	Frequency	Reason
MI learner progress updates	Monthly or Quarterly	Generated by CSM data supplied to client and follow up discussion on Apprentices at Risk and celebrate successes
Client update calls	Weekly/biweekly/monthly	Monitor progress and resolve escalations
Ad Hoc contact	As and when	Raise escalations and resolve issues
Quarterly review	3 months	CSM holds meeting to discuss actions and receive feedback on performance of programmes
Strategic account review	Annually	Attended by one of more of the Board members to discuss current cohorts/apprentices and receive feedback on performance of programmes
Client update emails sent by Board members	Ad hoc	Relevant updates relating to operation of DLS and any relevant operational changes, funding changes, employer actions that might be required

Professional Qualification Material Ordering Process

For all programmes that require a Professional Qualification, coaches and our Operations team work together to order the relevant materials through various professional bodies. Materials are ordered following the first day in learning to ensure that the correct materials are requested.

- [Material Ordering Process](#)

Escalations and Timely Completions Process

Using Bi-Weekly calls and a risk escalation tracker, CSMs and DMs monitor the progress of apprentices. The monitoring process ensures that we are aware of any apprentices who are disengaged from programme, no longer suitable for programme or unlikely to complete their programme on time.

- [Apprentice at Risk Escalation Process](#)

Timely Completions Policy

Coach	Delivery Manager	Client Success Manager
6 months prior to PED If learner is off track and likely to go OOF, follow escalation process and select 'Yes' on TCP drop down, adding the date they entered TCP. Set clear SMART Targets with approval from DM to meet PED.	6 months prior to PED Review escalations to see if learners have been added, discuss in coach 121's where learner PED is in next 6 months. Review SMART Targets set by coach and ensure EAC is updated.	6 months prior to PED Review escalation tracker to see if learners have been added at any stage, discuss in client meetings as appropriate and discuss any support client can give. Update escalation tracker with discussion notes and share TCP charges information.
3 months prior to PED If PED date is not likely to be achieved, discuss estimated PED with DM. Set clear SMART Targets to achieve new estimated PED.	3 months prior to PED Review escalations to see if learners have been added, discuss in coach 121's where learner PED is in next 3 months. Follow escalation process where intervention is needed. Review SMART Targets set by coach and discuss realistic end date. Ensure EAC is updated and estimated PED is correct.	3 months prior to PED Review escalation tracker to see if learners have been added at any stage, discuss in client meetings as appropriate and discuss any support client can give. Update escalation tracker with discussion notes and share TCP charges information.
At PED and beyond Discuss with DM and identify a realistic PED date. Set SMART targets with apprentice and LM to meet new PED Date and identify if this is within QAR year. Follow escalation process and ensure coach notes are updated at each visit to allow DM and CSM to monitor. If SMART targets are not met, immediate intervention needed from DM.	At PED and beyond Move to CSM Intervention if not already done so, discuss with CSM and agree new PED date and guide CSM with next steps e.g. forced withdrawal, commercial options etc. Review and manage each OOF in line with individual agreement, intervene where necessary and ensure EAC and estimated PED is correct.	At PED and beyond Review escalations tracker with TCP apprentices at CSM Intervention stage. Review comments and have a discussion with DM to understand suggested TCP charges. Review and manage each OOF learner in line with individual agreement and intervene where necessary if SMART Targets are not met.

Withdrawals and Break in Learning Process

If an apprentice has a change in circumstance and no longer wishes to continue the apprenticeship or feels they need a break from learning, we follow the below process to ensure the best outcome for the apprentice.

- [Break in Learning/Withdrawal Process](#)
- [Return from BIL Process](#)

Employer surveys

Throughout the programme, we send out three surveys to apprentices so that we are able to receive feedback and improve our performance as a training provider. We use the Rolling Action Log to keep track of responses and take any necessary actions.

- [Employer Survey Process](#)
- [Rolling Action Log](#)

17. Client Solutions Team Responsibilities, Objectives and KPI's

What the Client Solutions Team does:

Client Solutions (Consulting Director, & Principal Consultant)

Responsible for the Employer Growth Strategy (Ops Board/ Davies SLT Representation)

Solutions:

- Design enterprise solutions for clients working with Curriculum / Client Success Team/ VP of Academy / Other Talent Capabilities / RPF / ITT's / ATP lists and relationships with 3rd party managed services providers.
- Work Pan-Talent to drive growth and Talent capabilities.

Consulting:

- Meeting the growth targets are set out by the Operating Board which aligns to Talent overall growth strategy.
- Target specific sectors and employers through use of campaigns and drive the Sector facing image of Davies Professional Education
- Work with Client Success and Curriculum to ensure a consistency product suite is maintained which meets sector, market, employer and apprentice needs.

Role	Description / examples of activity
Consulting Director	Solutions design / Director of key relationships in the sector / IfATE route panel membership / Member of Davies SLT. Owner of the solutions part of the business, innovation and evolution of our standards, best practice recommendations, input into Strategic portfolio direction, Commercial proposition and pricing, Lead generation from new and existing employers. Works closely Client Success Director, Curriculum Director, Curriculum Manager, CSMs, Talent Growth Board. Manages the Principal Consultant of Davies Professional Education.
Principal Consultant	Client Growth both new and existing clients for apprenticeships / Bootcamps / Commercial offerings. Responsible for new and existing client growth in Professional Education and cross sell of Talent Capabilities. Works Pan Talent to support functions on driving client retention and revenue. Works closely Client Success Director, Curriculum Director, Curriculum Manager / Writers and supports CSMs.

Client Solutions Objectives

Objective 1: FY24 EBITDA (Gross Margin) of £1.47m - To support Professional Education to achieve Income of £4.93m for FY24. This is to be achieved by generation of new leads, new client logos and widening our stakeholder partnerships.

Objective 2: Achieve Income of £4.93m for FY24. To support Professional Education to achieve Income of £4.93m for FY24. This is to be achieved by expanding our income generating opportunities beyond apprenticeship income. This will be driven by innovation and creation of a range of commercial solutions (non apprenticeship income) which exceeds client needs and provides deeper opportunity for expansion and growth.

Objective 3: Expand client relationships, partnerships and stakeholders. To expand client relationships, partnerships and stakeholder influence through the design, development and implementation of tailored product solutions to support bids, tenders, business development and underpin our growth and quality improvement.

Objective 4: Board Support & Challenge. To perform effectively as a board member in FY24 though strategic support and challenge, maximising impact on the business, with strong contributions to the achievement of our Business Plan & project deliverables.

Bonus and incentive outline

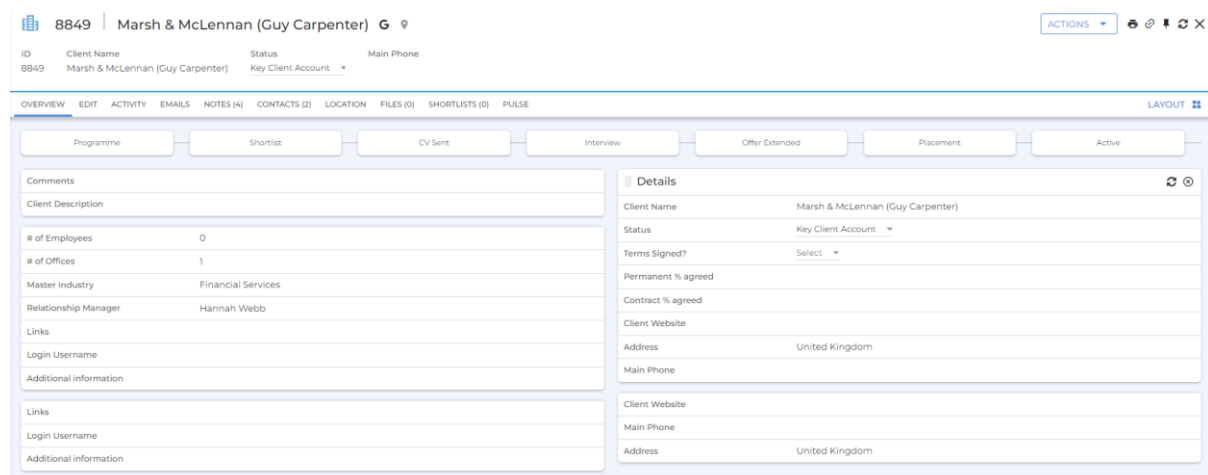
The Client Solutions team is bonused inline with Income target. Should the target be reached bonuses are paid quarterly.

18. Client Solutions Employer Management and Process

CRM Tracking system

For logging client contact we use a system called BullHorn. BullHorn is a cloud-based system where opportunities (pipeline) and client communications are stored.

CSM's, Principal Consultant and Consulting Director use BullHorn to track accounts calls and emails with Clients and track contact. The system allows for automated logging of email communications to accurately track contact with our employer contacts. The system is used across Davies Talent Solutions and reporting from the Opportunities list is shared across to Davies Group.



The screenshot displays the BullHorn CRM interface for a client named Marsh & McLennan (Guy Carpenter). The interface includes a header with the client name and a search bar. Below the header, there are tabs for Overview, Edit, Activity, Emails, Notes (4), Contacts (2), Location, Files (0), Shortlists (0), and Pulse. The main content area is divided into two columns. The left column contains a 'Comments' section with a 'Client Description' field and a table with client details. The right column contains a 'Details' section with fields for Client Name, Status, Terms Signed?, Permanent % agreed, Contract % agreed, Client Website, Address, and Main Phone. The table in the left column has the following data:

Field	Value
# of Employees	0
# of Offices	1
Master Industry	Financial Services
Relationship Manager	Hannah Webb
Links	
Login Username	
Additional information	

The 'Details' section on the right has the following data:

Field	Value
Client Name	Marsh & McLennan (Guy Carpenter)
Status	Key Client Account
Terms Signed?	Select
Permanent % agreed	
Contract % agreed	
Client Website	
Address	United Kingdom
Main Phone	

Business Development Strategy

Business development strategy is planned each year and will consist of client targeting (based on product portfolio). The FY24 and FY 25 Sales Strategy can be viewed from the links in the appendix.

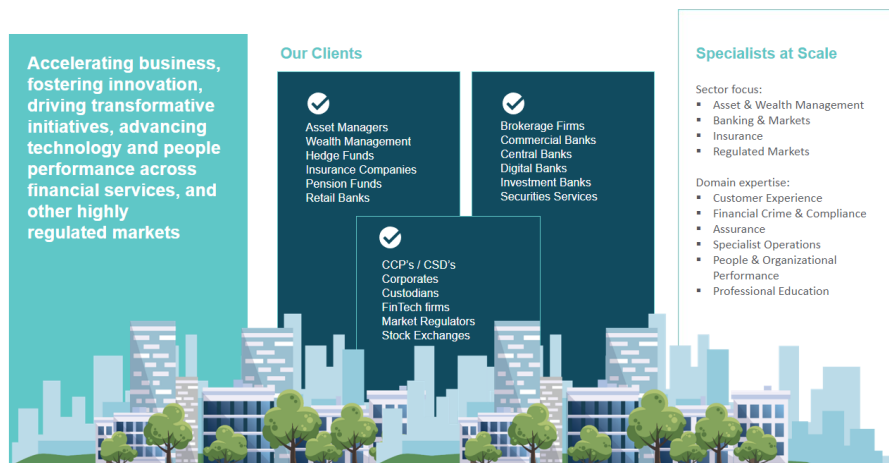
- Direct campaigns
- Social Media Campaigns
- Active Tender searches or ITT's

Davies Talent and Consulting activity

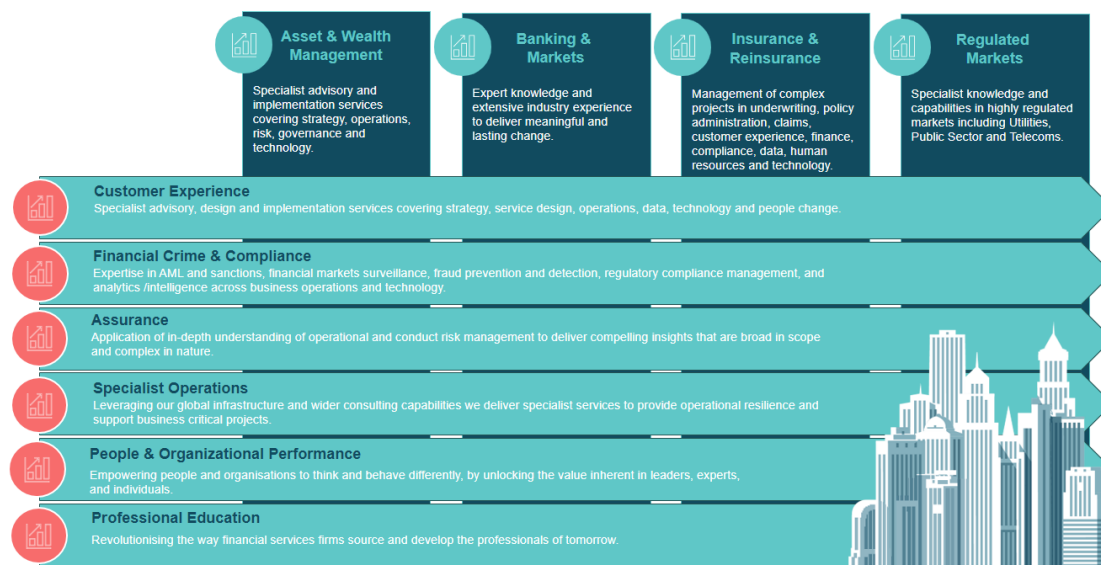
In addition to direct contact the PD and CD may also receive referrals from wider talent colleagues (consulting or resourcing) the CD will decide who is the most appropriate to continue the conversation on the opportunity.

The Davies Consulting Practices

Davies Consulting at a Glance



Combining sector and domain focused expertise to deliver change



Davies Talent Solutions capabilities & Commercial Propositions



We currently have a number of commercially funded propositions:

- Commercially funded Chartered Insurance institute Study Solutions – self study pathways incorporating materials to support the achievement of professional qualifications
- Commercially funded courses – know and H.I.T (high impact training)- short duration 6 week programmes which are fully supported with coach/tutor support.
- Academy – Source and develop talent deployed on a day rate basis to clients, this can include commercially funded training / H.I.T's or Flexi Job Apprenticeships

Our commercial strategy can be viewed in the appendix.

19. Accountability

Reporting accountability type	Frequency	Who is involved
Operating Board	Monthly 2 hours (and weekly 1 hour)	SVP of Davies Talent Solutions, Operating Board
Quarterly Operating Board	Quarterly 2 hours	SVP of Davies Talent Solutions, Operating Board, Victoria Sylvester, Crawford Knott Hawk Training
Operational Management Team	Monthly in person and 1 hour a week	SMT team – Head of Client Success, Lead Delivery Manager, Quality Manager, Compliance Manager, Curriculum Manager, Operations Manager, Principal Consultant
Quality & Standards Board	Monthly	VP of Professional Education, Quality and Delivery Director,

		Client Success Director, Consulting Director, Curriculum Director, Victoria Sylvester External Board support & challenge, Quality Manager, Learner Success Manager
Strategic QIP monitoring	Monthly	Operational Board
QIP projects	Set annually	Allocated to appropriate business lead
Notice to Improve	Through monitoring of QAR data	NTI identified and shared with SMT. SMT decide action plan and bring in areas of DLS who need to put plan in to action. Report back to SMT and DLS Board on progress against NTI

20. Operational Board reporting Client Success and Client Solutions

Each month the Principal Consultant and Consulting Director contribute to the Operational Board Pre Read deck. The topics covered in the slides are as follows: Example slide Deck can be found in our Operational Board folder.

Pipeline FY24 current to date

Pipeline FY24 oversight – H2

Projects update

Business Development update

Action plan for current and future month

Ongoing conversations – wins/opportunities

Existing client BD updates

Client Solutions Projects

Strategic update of live projects

Standards under IfATE review (revisions and adjustment update)

21. Internal Communication and meetings

Meeting type	Frequency	Reason
Mandatory company All staff virtual meeting	Monthly	To update all staff on company updates
Staff Feedback, Engagement, and Improvement Meetings	Monthly	Attended by the staff representatives to feedback to SMT and Board on suggestions and improvement.

All staff Team meetings	Biannual	Held in June and December – hosted by the Operating Board and SMT to provide update on performance, company updates and Davies group objectives and plan for remaining or upcoming financial year. Includes an element of CPD on specific theme.
Success / Solutions Team Meeting	Weekly	To update team on issues and share best practice, CPD, company updates, pipeline monitoring, SMT cascade
CSM / DM meeting	Bi-weekly	Mandatory meeting to discuss escalations, at risk apprentices, out of funding apprentices, employer concerns, forced withdrawals.
Curriculum & Quality Meeting	Monthly	Meeting with Curriculum, Success, Solutions and Quality to review updates and adjustments required to content, curriculums and direction based of delivery and quality feedback.
Client Solutions/ Success / Afternoon Tea Meeting	Monthly	Held to wrap up the week and to identify key topics for CSM / Solutions/ Curriculum Team Meetings
WIP & Onboarding Meeting	Weekly	Attended by Client Solutions and CSM's / Onboarding to review opportunities pipeline on BullHorn and update on the onboarding pipeline.
Programmer meeting	Weekly	Attended by DM's, Delivery and Quality Director and Head of Client Success to review coach allocation and resourcing requirements for onboarding pipeline.

22. Continued Professional Development

The Client Solutions & Client Success team have weekly and/or monthly 1-2-1s and defined objectives which relate back to the progress made in 2023/2024 and the planned strategic direction outlined for the 2023/2024 academic year. New strategic objectives will be defined by end of August each year and cascaded to members of the team in the end of year appraisals or PDR.

All staff members as part of their role objectives have personal development objectives and are required to adhere to 40 hours CPD a year.

CPD, is provided by:

- Research and review of relevant articles and legislation.
- Keeping up to date with legislative and regulatory changes.
- Updating our digital and technological skills as the DLS apprenticeship workforce.
- Company information cascade through regular all company meetings.
- Support from the Operating Board with their professional development.
- Mandatory Monthly CPD session with themed topics.
- Study towards relevant professional qualifications support by Davies Group.
- Engagement with Sector relevant events including conferences / seminars / networking / membership of local professional body institutes.
- Adherence to the relevant Code of Ethics and CPD requirements as prescribed by professional body membership.

23. Appendix

Document Name	Link	Page in Handbook
Davies Talent Solutions Website	https://talent.davies-group.com/	Page 4, Page 23
Curriculum Strategy 23/24	https://daviesgroup.sharepoint.com/:p:/s/DLSFWD/EZyST9tdUK5Av8gypdOat00Baio4RtCxqO68Z7Y4-FyVMA?e=GIBHK7&isSPOFile=1	Page 11, Page 19
Self Assessment Report 23/24	https://daviesgroup.sharepoint.com/:w:/s/DLSFWD/EZDcaVS2UI5GluXIQmmY3eMBz27MFVBt2b8l1RE-MC9m9g?e=sDeOef	Page 13
IfATE Legal Finance and Accounting Route Review	https://www.instituteforapprenticeships.org/reviews-and-consultations/route-reviews/legal-finance-and-accounting-route-review/	Page 14
FSSC Financial Services Skills Commission Future Skills Report	https://financialservicesskills.org/future-skills-report-2023/	Page 15

Davies Professional Education Programmes	https://talent.davies-group.com/capabilities/professional-education/#our-programmes	Page 19
Davies Attracting and Retaining Talent Brochure	https://daviesgroup.sharepoint.com/:b:/s/DLSFWD/EeVyHmiwVgtNsXjyTRzlyTwBICSMmOKH0uR5G-woO5h3g?e=CTqjIX	Page 22
Davies Free Basic Recruitment Offer	https://daviesgroup.sharepoint.com/:b:/s/DLSFWD/EdzW5e22wSNOICDmWKsVyacB1rjB59uY5BxMaRBIGlv m9A?e=yOxcwx	Page 22
Davies Insurance and Financial Services Insights Session	https://daviesgroup.sharepoint.com/:b:/s/DLSFWD/ERBF_oCdeA5NoBfQrqN9mCEBQRK-ZMvwXAvRHs_J0w14HQ?e=MNoZy7	Page 22
Davies Programme Overview Session (Example)	https://daviesgroup.sharepoint.com/:b:/s/DLSFWD/EZhdp8AkQYBOK30FIQ1xZCMBO05sd-sXkGxtMYyUUMqCPQ?e=muCndt	Page 22
Davies Onboarding Infographic	https://daviesgroup.sharepoint.com/:b:/s/DLSFWD/E d j y 6 a w N y l B P v 5 q e _ R d c 7 D Y B E p d e E i X h 3 2 A o e i g U Q c l Q k A ? e = q 2 f S k B	Page 22
Davies First Day in Learning Webinar	https://daviesgroup.sharepoint.com/:b:/s/DLSFWD/ETlaEJBFCHJMrd4CwuQoNtcBwEjioTfOfgru08_3ciYt2Q?e=aqYMSV	Page 22
Compliance and Risk Level 3 (Example Flyer)	https://daviesgroup.sharepoint.com/:b:/s/DLSFWD/ETMY3itv1M5Mma4AClv7n1YBhSSVZ1uuLEqVsIUwFdr kxw?e=e1amao	Page 23
Employer DAS Guide	https://daviesgroup.sharepoint.com/:b:/s/DLSFWD/EFrxxqJwrhVGtR6kEt8tbUYBNMthjrUK_m92s65tL4xUT Q?e=x8w7jI	Page 23
Levy Transfer Guide	https://daviesgroup.sharepoint.com/:b:/s/DLSFWD/ECcxUoJ2r1tIINH2OGkhO6AB_jOcBEu3RSwr1nQsY8sIPg?e=3KZ7F7	Page 23
Employer Guide	https://daviesgroup.sharepoint.com/:b:/s/DLSFWD/EF1le3cH3SZKgAkeqZ5gJ4kBhrzKaSewHteuUt-i6u6MQA?e=vc2ZmT	Page 23
CII Employer Guide	https://daviesgroup.sharepoint.com/:b:/s/DLSFWD/EFZZTAOWeShOmV0Vvt6hD5UBzD-3Q3Fm12y9Aa0NwAd5gA?e=cMdaYO	Page 23
Line Manager Overview Sessions	https://daviesgroup.sharepoint.com/:b:/s/DLSFWD/ESb20GCf1Y5CvJ9nMW0KkR4B9K3t89Yim1hDMfy9sg9XB4Q?e=7BZAUE	Page 23
Functional Skills Guide	https://daviesgroup.sharepoint.com/:b:/s/DLSFWD/EYKEPCaFPn5FsZxD-78fEi4BY-Zq-xsbupRmpfmNeGpziw?e=KHT8Q5	Page 23
Off The Job Guide	https://daviesgroup.sharepoint.com/:b:/s/DLSFWD/EYha7p2P5oNjlc2SblgBKY0BzK2qbZvsLuK7iEhds5dcfQ?e=piPIAb	Page 23
Compliance and Risk Level 3 (Example Crib Sheet)	https://daviesgroup.sharepoint.com/:x:/s/DLSFWD/EVSCUSEoZKBBip_YQ5Ny6uEBtYvANEDTyWfBepxoQs1ugQ?e=6f7fbJ	Page 23
Thrive Line Manager Guide	https://dls-learning.learn.link/content/63652bf7eab0ddf12b26f9eb	Page 23

Bullhorn Tracking Report	https://daviesgroup.sharepoint.com/:x:/s/DLSFWD/EWefpzgrOQVLpO1GtJG4Ys8BvrAScWhcL6e-Kuuy2zPUIQ?e=wTbFMA	Page 24
Employer Work in Progress	https://daviesgroup.sharepoint.com/:x:/s/DLSFWD/EX2-Tac5pHpMrvrFQTBjCTABud2GV-ZDtFlBx_O9CcdOWw?e=nV9sZi	Page 24, Page 25
Aptem Apprentice Approval	https://daviesgroup.sharepoint.com/:x:/s/DLSFWD/EWmJ155JvSNNnfx3ETJRSrMBCZqsl1ndyu8Kfir56k7r_Q?e=0adR4j	Page 24, Page 25
Onboarding Process Flow	https://daviesgroup.sharepoint.com/:b:/s/DLSFWD/EXYWAEK8JZpluMjii38uftEBqmONYdDqjl5gMNY7uhqN_Sg?e=lJJ4sh	Page 25
Onboarding Stage 1 Process	https://daviesgroup.sharepoint.com/:w:/s/DLSFWD/ETucHuDhbaFlkiEv9KivoWoBBNam2l73k_mqifEpZ9cTs_A?e=l8aY3U	Page 25
Moving to Onboarding Stage 2 Process	https://daviesgroup.sharepoint.com/:w:/s/DLSFWD/EQ6AuQhRStlGnm3t_yxHkp8Bwi-tUjLt0UnxRaO0ZnWg_g?e=1O30vl	Page 25
Onboarding Stage 2 Process	https://daviesgroup.sharepoint.com/:w:/s/DLSFWD/EYm2fl6DhnZDI_rBwB7ce-gB5it_3_NHBkGaFF5U0gGQbQ?e=XJ8UwZ	Page 25
First Day in Learning Process	https://daviesgroup.sharepoint.com/:w:/s/DLSFWD/Ee5R26ldnUFEiREtZCgQ8mkBP2dnAFD1432iZxSYy5jRNw?e=QlZmF	Page 25
Onboarding Escalation Process	https://daviesgroup.sharepoint.com/:w:/s/DLSFWD/ERq9-w60Hv1MsbSWjWNn3mYBRtSsKJM28IAdUeWZ6ztKlg?e=QoNvS3	Page 25
Compliance Check Process	https://daviesgroup.sharepoint.com/:b:/s/DLSFWD/EFebtutNdPhEkMC9QB7aERUBXVOKJLj45jc8CjrOGQ4MoA?e=VveJd8	Page 25
Compliance/Onboarding Escalation Process	https://daviesgroup.sharepoint.com/sites/DLSFWD/Shared%20Documents/Forms/AllItems.aspx?id=%2Fsites%2FDLSFWD%2FShared%20Documents%2FProcesses%202023%2F009%5FCompliance%2DOnboarding%20Escalations%5Fv1%2Epdf&parent=%2Fsites%2FDLSFWD%2FShared%20Documents%2FProcesses%202023&p=true&ga=1	Page 25
Compliance Escalation Proces	https://daviesgroup.sharepoint.com/:b:/s/DLSFWD/ESHmAl_hG49PqV8S787scQQBi1Ct_xLtlI3-YXsGvaVi3w?e=JOLTV9	Page 25
Onboarding Ticklist	https://daviesgroup.sharepoint.com/:w:/s/DLSFWD/EV9c_5KNokBLIOWlv3GP0igBRJyEy9NFfgL_6ik_6_Q8ZQ?e=rQSOyB	Page 25
Account Allocations	https://daviesgroup.sharepoint.com/:x:/s/DLSFWD/EWVKmEGZnERHpfv7ZMbK8FQB6V1esEnoz82dCpX39qYqdA?e=Zxfst	Page 25
Material Ordering Process	https://daviesgroup.sharepoint.com/sites/DLSFWD/Shared%20Documents/Forms/AllItems.aspx?ga=1&id=%2Fsites%2FDLSFWD%2FShared%20Documents%2FProcesses%202023%2F024%5FPQ%20Material%20Ordering%2DInvoicing%20and%20FDIL%20process%5Fv2%2Epdf&viewid=3b9a465b%2D6f1c%2D45cd%2Daaa	Page 26

	a%2D7d0307f68d61&parent=%2Fsites%2FDLSFWD%2FShared%20Documents%2FProcesses%202023&isSPFile=1&OR=Teams%2DHL&CT=1706693232712&clickparams=eyJBcHBOYW1lIjoiVGh0bXNlRGVza3RvcCIsIklFwcFZlcnNpb24iOiI0OS8yMzExMzAyODcyNCIsIkhkhc0ZlZGVyYXRIZFVzZXliOmZhbHNlQ%3D%3D	
Apprentice Escalation Process	https://daviesgroup.sharepoint.com/:b:/s/DLSFWD/Ecw4lFrPkEJFv0036_XjpZlBzWv_uqCnNJ2MzfpDMbgRng?e=6CSzpO	Page 26
BIL/Withdrawal process	https://daviesgroup.sharepoint.com/sites/DLSFWD/Shared%20Documents/Forms/AllItems.aspx?id=%2Fsites%2FDLSFWD%2FShared%20Documents%2FProcesses%202023%2F006%5FCHOC%5Fv1%2Epdf&parent=%2Fsites%2FDLSFWD%2FShared%20Documents%2FProcesses%202023&p=true&ga=1	Page 26
Return from BIL Process	https://daviesgroup.sharepoint.com/sites/DLSFWD/Shared%20Documents/Forms/AllItems.aspx?id=%2Fsites%2FDLSFWD%2FShared%20Documents%2FProcesses%202023%2F026%5FReturn%20from%20BIL%5Fv1%2Epdf&parent=%2Fsites%2FDLSFWD%2FShared%20Documents%2FProcesses%202023&p=true&ga=1	Page 26
Employer Survey Process	https://daviesgroup.sharepoint.com/sites/DLSFWD/Shared%20Documents/Forms/AllItems.aspx?id=%2Fsites%2FDLSFWD%2FShared%20Documents%2FProcesses%202023%2F040%5FSurveys%5Fv1%2Epdf&parent=%2Fsites%2FDLSFWD%2FShared%20Documents%2FProcesses%202023&p=true&ga=1	Page 27
Rolling Action Log	https://daviesgroup.sharepoint.com/sites/DLSFWD/Shared%20Documents/Forms/AllItems.aspx?ga=1&id=%2Fsites%2FDLSFWD%2FShared%20Documents%2FProcesses%202023%2F047%5FRolling%20Action%20Log%5Fv1%2Epdf&parent=%2Fsites%2FDLSFWD%2FShared%20Documents%2FProcesses%202023	Page 27
Employer Contracting Process	https://daviesgroup.sharepoint.com/sites/DLSFWD/Shared%20Documents/Forms/AllItems.aspx?id=%2Fsites%2FDLSFWD%2FShared%20Documents%2FProcesses%202023%2F013%5FEmployer%20Contracting%5Fv1%2Epdf&parent=%2Fsites%2FDLSFWD%2FShared%20Documents%2FProcesses%202023&p=true&ga=1	Page 28
Product Review Strategy	Product review strategy Draft June2023 PC VM.pptx	References Curriculum strategy
FY 24 and FY 25 Sales Strategy	TRUST planning - Sales Strategy H2.docx TRUST planning - Sales Strategy FY25.docx	Page 30
Commercial Sales Strategy	TRUST planning - Commercial Strategy.docx	Page 31