Specification of Competency Standards of the Insurance Industry
Unit of Competency

Title	Plan and manage continuing professional development (CPD) training
Code	105529L5
Range	This unit of competency is applicable to those who are responsible for managing continuing professional development (CPD) training courses. It involves identifying development needs, designing training courses, coordinating with relevant parties to organize the courses, enrolling staff into the courses and evaluating training effectiveness upon completion of training.
Level	5
Credit	3 (for reference only)
Competency	Performance Requirements 1. Possess knowledge of CPD requirement for insurance practitioners • Familiar with insurance market • Familiar with statutory CPD requirements • Comprehend operating contexts of insurers • Able to use CPD tracking software • Able to review effectiveness of CPD training 2(a). Plan CPD courses • Keep updated with regulatory requirements on CPD • Identify potential development areas for staffs • Analyze development needs of agents against identified areas • Consolidate CPD training topics • Plan CPD courses based on identified topics 2(b). Coordinate with relevant parties to deliver CPD training • Coordinate with training department to organize in-house CPD courses • Coordinate with suppliers if expertise does not rest with training department • Arrange agents to enroll for training • Arrange collection of feedback upon completion of training • Keep track of staffs' CPD hours by software or via training department 2(c). Improve CPD course planning process continuously • Review effectiveness and efficiencies of CPD course planning process in light of agents' feedback, as well as changing market environment and regulatory requirements • Improve CPD course planning process based on review findings 3. Manage continuing professional development (CPD) training effectively • Design CPD training topics based on identified potential areas for development • Coordinate with different organizing units to prepare and deliver CPD training • Monitor staffs' training progress through software or training department • Evaluate effectiveness of the planning process of CPD courses based on staffs' feedback, changing market environment, and regulatory requirements.
Assessment Criteria	The integrated outcome requirements of this unit of competency are: • Able to identify potential developmental needs of staffs • Able to collaborate with internal and external units in developing CPD courses • Able to deliver necessary CPD trainings targeted at predefined needs • Able to revise CPD course planning process based on agents' feedback, changing market environment and regulatory requirements.
Remark	This unit of competency is also applicable to general insurers, life insurers and broker.