

Coventry, Warwickshire.

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FINANCIAL PLATFORM & SERVICES TRAINING CONSULTANT

CRM - Platform – Financial, Mortgage & Protection Services

A well networked, B2B Banking & Financial Services Training Consultant with extensive experience delivering face-to-face Regulatory, Technical and Operational courses to groups and individuals, using banking frameworks to support business objectives and relevant regulatory and legislative requirements. Having developed a rewarding network of contacts by building and supporting key relationships through Stakeholder management, and the ability to work to board level within the banking industry and the Mortgage, Protection and Financial Services sectors' distribution channels. Impressive experience developed in retail banking, intermediary and direct call centre business arenas. Possessing high levels of personal integrity and credibility.

"I am now looking to secure, my next contract to train, coach and support delegates in their respective field, while continuing to deliver considerable results and outcomes".

AREAS OF EXPERTISE

- Training & Development (T&D) delivery and Design Consultant within Retail Banking, IFAs, Mortgage Intermediary and Protection Sectors. At Head office, IFA offices, mortgage offices, banks' branches and call centres, both 1-2-1 and small to large group audiences
- Designing, facilitating, presenting and delivering with full understanding of different learning theories and styles
- Financial Services, Wrap Platforms, Mortgage Platforms, FS technology solutions and potential impacts on networks and distributors
- Training MMR & RDR plus regulations and implications within all Finance and Banking
- Management training and supporting in-house technical, national accounts and practices plus external candidates
- Formal and live assessments, and signing-off of candidates in various formats (call centre, retail, management while enhancing process and procedural developments in full compliance
- Creating T&D material in a variety of mediums (PowerPoint, sales aids, hand-outs, etc.)
- Clear and concise communications the ability to adapt to group dynamics that ensure positive returns
- Managing change and delivering accurate procedural, product and process content in compliance with risk governance often at a fast pace. Organising proactively, and multi-tasking on own initiative
- Imparted knowledge of compliance, regulatory rules and governance and ensuring training material is compliant and fit-for-purpose

PROFESSIONAL DEVELOPMENT

Director	Financial Services Training Ltd	2014
CeMAP	Certificate in Mortgage Advice & Practice 1, 2, & 3	2002

PROFESSIONAL EXPERIENCE AND SIGNIFICANT ACHIEVEMENTS

Delivery & Facilitation Training Consultant (Contract) Jun 2016 - May 2017

Lloyds Banking Group: delivered 2 workshops (Feb – May 2017);

- Face-to-face regulatory, technical and operational courses to 2 groups daily on 'Lending Values' (Apr-May 2017) and 'Customer Resourcing Tool' (CRT), (Feb -Apr 2017)
- Utilised a pre-designed framework to support business objectives and relevant regulatory and legislative
- Hearts & Minds, / behavioural knowledge upskills through sharing of best practice
- Monitored own delivery standards and feedback to ensure 'best in class' delivery
- Utilised the Learning Management to carry out timely training administration to the highest standard
- Delivered an effective and efficient service to colleagues and stakeholders by keeping up-to-date with new processes, key developments and changes
- Managed and championed operational risk that ensured compliance with Group-wide frameworks and standards

Delivery & Facilitation Training Consultant (continued)

Lloyds Banking Group: 1 workshop; 'Opening Business Current Account for Supervisors', (Oct 2016 - Dec 2016);

- Face-to-face regulatory, technical and operational workshop to 2 groups of 12 managers daily
- Supported the delivery of a 'Right First Time' culture within regulatory and legislative requirements
- Delivered clear, concise and compliant sessions whilst managing operational risk and group-wide policies
- Ensured all required delegates attended and completed the course by completing timely and effective MI

HSBC: 1 workshop: 'Due Diligence', (Jun 2016 - Oct 2016);

- Facilitated and delivered full-day Global Due Diligence workshops to groups of around 15 students
- Imparted regulatory and compliance in respect of new global due diligence requirements to Managers and branch teams. Covered the need of CDD and the consequences of non-compliance.
- Delivered an effective service to colleagues and stakeholders. Kept up-to-date with new processes, key developments, updates and changes. Prepared own documentation, training aids etc.

Training Consultant (Employed)

Nov 2015 - Mar 2016

IRESS Financial Software Solutions: 'Wealth Product Suite'.

- Ensured each session was specific, relevant and adapted to specific client's needs to TAP standards including workshops, online, onsite offices and classrooms
- Identified training requirements with key stakeholders, analysed training styles and reported on feedback, progress, and further development needs. Liaised with the Project Manager, Account Executive, Data Migration teams, (other IRESS teams) and Account Management teams to ensure successful solutions were implemented for the customer
- Managed risk and ensured compliance to Group-wide frameworks and standards

Training Design Consultant (Contract)

Sep 2015 - Nov 2016

Lloyds Bank: 'Train the Trainer'.

- Designed training modules for train-the-trainer and internal delegates for the MCD
- Designed training aids, worked within specific timescales and goals
- Ensured all documents were compliant and suitable for the MCD delivery to all appropriate levels of the business

Delivery and Facilitation Consultant (Contract)

Jul 2015 - Aug 2015

Barclays Bank: 'Buy to Let' (BTL workshop).

- Delivered BTL mortgage training for market leaders plus direct and branch-based Mortgage Advisers
- Imparted knowledge of compliance and regulatory rules and governance and impacts to the greater business area
- Ensured compliant training material delivered was fit for purpose
- Supported colleagues' training with feedback and delivered continuous improvements and best practice

Mortgage Academy Designer (Contract)

Jan 2015 - May 2015

Santander Bank:

- Re-wrote Mortgage Academies for experienced and 'New to Role' Mortgages advisers from inception to sign-off
- Designed mortgage assessments, role plays, walkthrough practice and review scenarios
- Designed academy material for Mortgage Relationship Managers and Call-Centre Mortgage Enquiry Consultants (new to role & existing teams sign-off).
- As above, imparted knowledge of compliance, regulatory rules and governance and ensured training material is compliant and fit-for-purpose

Account Opening Trainer (Contract)

Jul 2014 - Dec 2014

Santander Bank:

- Gained 100% scoring from delegate evaluations. Delivering training material to Retail Banking (Personal Bankers, Local Business Managers, Branch Managers and Branch Directors) to up-skill to the new account opening processes
- Observed, assessed, coached and provided feedback to delegates, through group training and role-plays
- As above, imparted knowledge of compliance etc and ensured training material is compliant and fit-for-purpose
- Ensured compliant sales appointments were fully understood and rolled-out
- Supported trainees with feedback and best practice

MMR Delivery Trainer (Contract)

Jan 2014 - Apr 2014

Nationwide Building Society

- Delivered training material to groups and individual advisers to up-skill from non-advised mortgage sales to advised mortgage sales. Retail & Direct Call Centre Managers, Mortgage Consultants & Mortgage Representatives
- Observed, coached and provided feedback to delegates (Area & Team Managers, Mortgage Consultants and Mortgage Representatives)
- Provided 1-2-1 and group coaching support, moving non-experienced consultants from initial to competent stage
- Trained delegates in the production of suitability letter generation, new IT systems, plus sales and process delivery
- Identified as a Specialist Trainer for Telephony & Systems processes
- Assessed candidates (Area Managers, Team Managers, Mortgage Consultants (Retail & Direct))

Protection Training Consultant (Midlands & North of England) Jul 2013 - Nov 2013**Mortgage Advice Bureau**

- Trained and supported Mortgage Advisers both experienced and new
- Advised and implemented protection policy ensuring a full understanding and compliance
- Provided 1-2-1- and group coaching support, moving non-experienced consultants from initial stage through to competence within the protection sales arena
- Increased protection written business and revenue across SMEs for the greater achievements of MAB business owners and the individual advisers
- Developed subject matter (Sales Aids and PowerPoint presentations)
- Observed and presented feedback in sales observations in a training and live environment

Platform Training Consultant (Contract) Mar 2012 - Jul 2013**Openwork (Travelled throughout the UK)**

- Consulted in the RDR section of the largest multi-tie network in the UK, backed by global insurance giant Zurich
- Provided field-based training and support to Openwork Key Accounts & Partners in the use of the Openwork Wrap
- Platform and Point-of-Sale systems in preparation for a post RDR environment
- Provided a coordinated approach to support Partner transition with Sales Management & RDR Consultants
- Built, developed and updated training material including face-to-face, online and distance learning materials
- Subject matter expert in Openwork systems. Trained and developed Sales Management and Openwork's employees
- Trained large groups of IFAs with PowerPoint, 1-2-1 and group sessions, thereafter carried out ongoing support and training of individuals and groups

Early Career Summary**Business Development & Relationship Consultant Jan 2012 - Mar 2012****Aldermore Mortgages:**

- Supported and advised SMEs and networks throughout the S. Wales and S.W. region

Personal Assistant to M.D. Mar 2011 - Dec 2011**Green Man Environmental Services:**

- Managing all business functions

Sales Executive Jan 2011 - Mar 2011**Stratstone Land Rover:**

- Sold 4 cars in month one, 8-month two without any formal training. Increased sales of GAP insurance

Training Manager (Sales Effectiveness) Jul 2009 - May 2010**Post Office Financial Services / Bank of Ireland:**

- Increased business sales: Malvern Link (182%), Stourbridge (138%), Droitwich (111%), Carterton (105%)

Premier Account Manager Sep 2008 - Feb 2009**Barclays Bank PLC:**

- Identified and introduced Premier relationship personal bank accounts to existing and new HNW clients

Northern Rock (2003-2008):**Senior Business Development Manager / Product Specialist 2007 - 2008**

- Established and grew this business: Maximised growth value of sales in all income streams

Product Sales Specialist 2004 - 2007

- Top performing Product Sales Specialist in the country consecutively for 4 years

Independent Mortgage Advisor 2002 - 2003**John Charcol /Bradford & Bingley:**

- Consistently Top Broker achieving up to 243% of quarterly target

Senior Customer Service Manager 1995 - 2002**Birmingham Midshires Building Society, (Various Branches)**

- Led the Pershore branch from 24th to 1st in league, Malvern branch from 24th to 1st in league, Exeter branch from 21st to 1st in league, Plymouth branch from 18th to 1st in league, Oxley branch from 22nd to 1st in league

Personal: Hobbies & Interests; Walking, reading. Born; 1960. Status; Married.

For references please contact me. For more information on how I achieved, what I achieved please see my LinkedIn.