

# CPD course content

For CPD packages from Growth in Motion



The 18 hour package provides access to all the courses below. The 6 and 12 hour packages include a selection of these courses.

## A guide to workplace professionalism (3 hours)

Build professionalism into every aspect of your job with examples of do's and don'ts in real-world scenarios. Topics covered are:

- The fundamentals of workplace professionalism
- How to correspond professionally with clients
- Email and phone etiquette
- Formal vs informal communication

## Ethics in the workplace (3 hours)

Learn seven key principles to guide your ethical behaviour at work, and explore a few of the most common ethical pitfalls in the workplace and how to avoid them. Topics covered are:

- What are business ethics and why are they important?
- Universal principles for ethical behaviour
- Overcoming rationalisations to make ethical decisions
- Appropriate use of company assets
- Plagiarism and how to avoid it
- Minimising gossip in the workplace
- Witnessing and reporting unethical behaviour

## Asset allocation (3 hours)

Learn why asset allocation is important, how it is done and how clients benefit from it. Topics covered are:

- Terminology when talking to clients
- Asset allocation models
- Income portfolios, balanced portfolios and growth portfolios
- Rules for creating an asset allocation plan
- Goal-setting before investing
- Time vs. timing the market
- Diversification and investment choices
- The connection between asset allocation and diversification
- Rebalancing

## Economic and investment overview (4 hours)

This introduction to economic thinking and understanding is critical for understanding the context of finance and investments. Topics covered are:

- Risk profiles, types of risk, and ways to reduce risk
- The economic and business environment and cycles
- Government monetary and fiscal policies
- Primary function of the Reserve Bank
- Interest rates and exchange rates
- Economic indicators

## Dealing with difficult conversations (2 hours)

For when you need to confront a co-worker, give an employee bad news, or discuss a delicate issue with a client, learn a four-step process to help you have a difficult conversation and reach a place of mutual understanding. Topics covered are:

- The risks of avoiding difficult conversations
- Step 1: Prepare. Gather your thoughts and change your mindset
- Step 2: Frame it effectively. What you say and how you say it; framing difficult conversations effectively
- Step 3: Discuss, don't lecture. Practice active listening
- Step 4: Wrap up. Find the right stopping point, summarise and follow up
- Case study
- Coaching video

## Complaints management (3 hours)

Learn the process of client complaints and how to manage them as required by the Regulator. Topics covered are:

- The Treating Customers Fairly (TCF) principles relevant to complaints handling
- Unreasonable post-sale barriers
- Potential complainants in terms of the General Code of Conduct
- Guiding principles of a complaints management framework
- Categorising and analysing reportable complaints
- Communicating around complaints
- Interacting with Ombud offices
- Possible complaints outcomes