



CERISE+SPTF

E-learning presentation webinar

Sept. 2024





CERISE+SPTF

Our standards



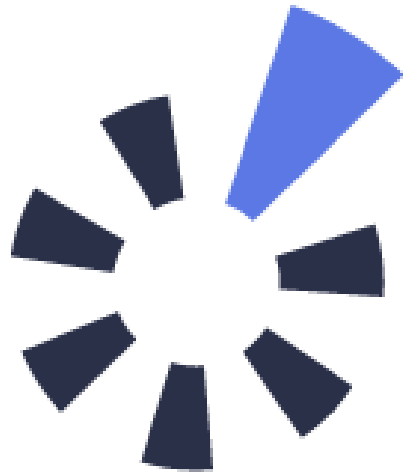
Client Protection Pathway

Our tools and resources



SPI Online

Responding to training needs



E-learning

#1 GET STARTED

free, self-paced training

For learners who want to **get to know our standards and tools** or update their knowledge

#2 GO DEEPER

enriched, instructor-led

For learners wishing to **build skills** to conduct or analyze SPI or CP **assessments**

#3 GET QUALIFIED

personalized coaching

For learners who want to become **qualified auditors** and support FSPs in their audits and strategy

*SEPM
Pathway*



*Client
Protection
Pathway*



- **For anyone**
- **Free**
- **3 hours**
- **Self-paced**
- Online – videos, interactive slides, tutorials, quiz...
- No certificate

- For those who passed #1 course
- **EUR 800**
- **4-5 hours per week, over 9 weeks**
- **Cohort-based (up to 20 pple)**
- **Instructor-led** – virtual classes, forum discussions, scored assignments (mock audit)
- **Training certificate**

- For those who passed #2 course + selection process
- **EUR 1,200**
- **Within 6 months**
- **Real field audit**
- **Individual coaching**
- **Qualification certificate**

Our next #2 GO DEEPER courses

Pathway	Language	Course	Dates
SEPM	EN	Go deeper on SEPM	Sept. 16 – Nov. 17
SEPM	ES	Formarse en la GDSA	Oct. 7 – Dec. 8
CP	FR	Se former à la Protection des Clients	Sept. 23 – Nov. 24
CP	EN	Go deeper on Client Protection	Oct. 7 – Dec. 8

<https://en.spi-online.org/training>

Our next #2 GO DEEPER courses

Objectives:

- ✓ **To deepen your knowledge of standards**
- ✓ **To build your assessment skills**

For each Dimension or CP standard:

- What the Dimension / standard is about
- Key arguments
- Methodological focus (prepare the assessment, prepare and conduct a branch visit, prepare and conduct interviews, interact with clients, learn how to score, calculate the APR, conduct a robust analysis, build an action plan)
- Practical exercise

Interactive modules
Videos, tutorials
Readings
Virtual classes
Forum discussions
Collaborative boards
Assignments

Our next #2 GO DEEPER courses

Completion rules:

- ✓ **All modules to be completed**
- ✓ **All 4 virtual classes to be attended**
- ✓ **All assignments to be submitted in due time, and validated by Cerise+SPTF instructors (mock audit)**

*Make sure you can dedicate **3 to 5 hours per week** to the course, for 9 weeks.*

*Make sure you will be **available for all virtual classes**.*

<https://elearning.spi-online.org/catalog>

GO DEEPER ON SEPM

Virtual classes:

- Week 1: Tue 17 Sept. 10:30am - 11:30am CET
- Week 4: Thu 10 Oct. 10:30am - 12:30pm CET
- Week 5: Thu 17 Oct. 10:30am - 12:30pm CET
- Week 9: Thu 14 Nov. 10:30am - 11:30am CET

GO DEEPER ON CP

Virtual classes:

- Week 1: Tue 8 Oct 10:30am-11:30am CET
 - Week 4: Thu 31 Oct 10:00am-12:00pm CET
 - Week 6: Tue 12 Nov 10:00am-12:00pm CET
 - Week 9: Thu 5 Dec 10:00am-11:30am CET
- Mock audit submission deadline:*
- Week 7: Sunday 24th of November.

A prerequisite for the qualification process

Validation of the “#2 Go deeper” course is a PREREQUISITE to access “#3 Get qualified” program...



But qualification is not required to perform quality audits!

SPI Online remains a free and public tool, to be used by anyone. Level 2 training will already give you the skills and knowledge to conduct quality audits

What is the Level 3 qualification program?

A personalized and individualized **coaching program** provided by Cerise+SPTF for individuals interested in becoming **qualified auditors**.

Being a SEPM or CP qualified auditor also means you join the **SEPM Professionals Network**, a community of experts run by Cerise+SPTF, who support financial service providers in their SEPM and CP agenda and strategy.

Access to Level 3 is subject to a selection process, based on the profile and work perspective of the applicant.

Target audience for Level #3:

1. **Consultants, TA providers**, who support FSPs in the field
2. **Investors**: only specific profiles (e.g. impact manager)
3. **Networks**: only specific profiles (e.g. SEPM manager, trainer...)
4. **Rating agencies**: employees and external committee members

Cerise+SPTF qualifies a maximum of 2 individuals per organization, and doesn't qualify FSP employees.

Start the journey!

*SEPM
Pathway*

**#1
Get started
on SEPM**

A graphic for the first step of the SEPM pathway. It features a stylized 'X' shape composed of green and blue geometric shapes. Below the 'X' is a dark blue triangle containing the CERISE SPTF logo and text.

CERISE SPTF



**#2
Go deeper
on SEPM**

A graphic for the second step of the SEPM pathway. It features a stylized 'X' shape composed of green and blue geometric shapes. Below the 'X' is a dark blue triangle containing the CERISE SPTF logo and text.

CERISE SPTF



**#3
Get qualified
on SEPM**

A graphic for the third step of the SEPM pathway. It features a stylized 'X' shape composed of green and blue geometric shapes. Below the 'X' is a dark blue triangle containing the CERISE SPTF logo and text.

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*Client
Protection
Pathway*

**#1
Get started
on Client
Protection**

A graphic for the first step of the Client Protection pathway. It features a stylized 'X' shape composed of green and orange geometric shapes. Below the 'X' is a dark blue triangle containing the CERISE SPTF logo and text.

CERISE SPTF



**#2
Go deeper
on Client
Protection**

A graphic for the second step of the Client Protection pathway. It features a stylized 'X' shape composed of green and orange geometric shapes. Below the 'X' is a dark blue triangle containing the CERISE SPTF logo and text.

CERISE SPTF



**#3
Get qualified
on Client
Protection**

A graphic for the third step of the Client Protection pathway. It features a stylized 'X' shape composed of green and orange geometric shapes. Below the 'X' is a dark blue triangle containing the CERISE SPTF logo and text.

CERISE SPTF

Time for questions now!

Please raise your hand or write in the chat box.

For very personal, individual requests, we will address them after the webinar.



Quick survey

Do you plan to register to a #2 GO DEEPER course?

Thanks

training@cerise-spm.org

