

Brokerplan Academy

A Year of Virtual Training

The Effect of Lockdown & Remote Working on Education
Delivery to our Partners & Franchisees March 2021



This year has brought about many changes in the way we work, the shift to remote working has been a learning experience here at Brokerplan. The need to adapt the way we train and educate our partners has caused us to drastically shift our software and processes.

A year ago, in March 2020, we held what was to be our final in-person training course at our head offices in Selby, North Yorkshire. After the lockdown was announced we suddenly had to explore new avenues as to how we could continue to train our new partners whilst there were restrictions on physical visits to the office.

Luckily, we already had access to a virtual meeting facility that we had been using for our weekly lender webinars for established partners. Adapting this software to enable us to provide an in-depth training course spanning multiple days would prove to be quite the challenge, and has been an ongoing process of trial and improvement, as our business development manager Laura Fieldhouse explains:

"We very quickly realised that we would have to change the format of the training for it to work online. We spread the training over five afternoon sessions, instead of training intensively for 2 and a half days. We created a workbook to guide people through the week and we have constantly asked for feedback. This has resulted in changes to the order of sessions, changes to breaks and also development of the content to make the training as enjoyable and interactive as possible!"

Laura Fieldhouse

Business Development Manager

Our comprehensive business training covers

- FCA regulations and compliance requirements
- Business procedures & administration essentials
- Core commercial product training
- Lead generation and business development
- How to use our bespoke sourcing system 'Lender Hub'
- The fundamentals of case underwriting
- Developing Ancillary / Additional Revenue Streams
- Business Planning, Forecasting and Budgeting



Want to learn more about Brokerplan?
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