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# Data and Technology (Personal Finance)

Learning  
resources  
v1.5  
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# About Data and Technology

Understands and utilises the benefits of existing and emerging technologies and makes effective use of data and insights to support decisions.

This section outlines the Data and Technology competency standards for each of the four professional bands, together with links to relevant CPD learning, qualification units and other learning to help you prioritise and access your skills development.

## The bands

The Professional Map is structured into 4 bands of experience, each describing the different level of impact professionals have in the work they do.

	Band 1	Band 2	Band 3	Band 4
<b>Typical job roles</b>	Front line staff, administrative and entry level roles	First line managers, team leaders, regulated and specialist roles	Middle managers, and senior technical roles	Senior leaders and business owners
<b>Nature of work</b>	Tactical, focusing on the day to day	Operational, with some complexity	Complex, with challenging requirements	Strategic, with a significant level of complexity and challenge
<b>Sphere of influence</b>	Line manager, immediate colleagues and customers/clients	Managers, colleagues, customers/clients and external professionals	Wider range of stakeholders, both internal and external	Senior stakeholders from across the profession, customers, suppliers and regulators
<b>Focus of activity</b>	Deliver immediate and short-term outcomes	Directly create short-term value, contribute to longer-term value	Create medium to long-term value	Create long-term value
<b>Focus of thinking</b>	Gather and use information	Contribute to the thinking and analysis of information	Critically question information and evaluate it to make informed judgements and decisions	Develop evidence-based thinking, using qualitative and quantitative data to shape the future activity
<b>Focus of knowledge</b>	Knowledge of the principles of personal finance	Broad understanding of personal finance practice	Deeper understanding of the concepts of personal finance, with specialism in a functional area	Deep technical knowledge in an area, or an excellent understanding of the broader environment
<b>Where time is spent</b>	Customer/client services, providing information, handling data, following procedures	Issue identification, analysis and evaluation, proposal and delivery of solutions to agreed standards, and within agreed limits	Understanding the wider business context and risk, bringing strands of activity together, innovating	Developing strategies and plans, making complex judgements, considering the organisation and sector position
<b>Breadth of focus</b>	Team	Department	Area or responsibility/Organisation	Organisation/Profession/Wider society

## Band 1

### Competency standards

- I understand and can use the technology tools required for my role
- I am open to changing the way I work in the light of new technologies
- I use appropriate digital and non digital data in my work
- I use technology to effectively communicate with others
- I understand how to use social media at work and the risks associated with it

### Band 1 learning resources

Member CPD	Assess corporate e-learning	Training and courses	Qualification units
<a href="#">2021 – The year adviser technology leaves the back office</a> <a href="#">Our Relationship with Technology</a>		<a href="#">EDII – Digital Minds</a> For more details on CII Training, please visit our website: <a href="http://www.cii.co.uk/learning/training/">www.cii.co.uk/learning/training/</a>	

## Band 2

### Competency standards

- I understand and utilise the technology that is available in my organisation
- I keep up to date with new and emerging technologies and apply them in my work whilst being aware of their risks
- I make suggestions as to how technology can be used to improve processes
- I analyse and evaluate data and insights using appropriate technologies
- I apply technologies to present information

### Band 2 learning resources

Member CPD	Assess corporate e-learning	Training and courses	Qualification units
Talking Data: Plain and Simple		EDII – Digital Minds  For more details on CII Training, please visit our website: <a href="http://www.cii.co.uk/learning/training/">www.cii.co.uk/learning/training/</a>	

## Band 3

### Competency standards

- I use technology to support the delivery of best practice and deliver optimal customer outcomes
- I use developments in technology and the use of data and insights to add value to my functional area
- I embrace developments in working practices and technology and adopt them in my day to day activities
- I use data and technology to improve the efficiency and effectiveness of processes and drive operational change
- I make evidence based and data driven decisions

### Band 3 learning resources

Member CPD	Assess corporate e-learning	Training and courses	Qualification units
		<a href="#">Dive In Festival</a> <a href="#">EDII – Digital Minds</a> For more details on CII Training, please visit our website: <a href="http://www.cii.co.uk/learning/training/">www.cii.co.uk/learning/training/</a>	

## Band 4

### Competency standards

- I ensure that processes exist within the organisation to ensure the timeliness, accuracy and validity of data and insights
- I ensure that everyone in the organisation is using data, insights and technology effectively to add value
- I drive digital and technological transformation in the organisation
- I investigate and implement emerging technologies to drive business improvement
- I collaborate with others in the profession to find new ways to use technology in my organisation

### Band 4 learning resources

Member CPD	Assess corporate e-learning	Training and courses	Qualification units
<a href="#">Understanding and mitigating the risks of lead generation</a>		<a href="#">Dive In Festival</a> For more details on CII Training, please visit our website: <a href="http://www.cii.co.uk/learning/training/">www.cii.co.uk/learning/training/</a>	



# Member CPD

Here you will find links to Member CPD available related to this competency.

Webinar: [Our Relationship with Technology](#)

Webinar: [2021 – The year adviser technology leaves the back office](#)

Webinar: [Talking Data: Plain and Simple](#)

Webinar: [Understanding and mitigating the risks of lead generation](#)

# Training and courses

The diversity of our course programme and breadth of corporate services makes us a one stop-shop training provider. We work in partnership with employers to develop relevant and cost-effective training solutions that are driven by business needs and deliver lasting results.

## **CII Training**

For more details on CII Training, please visit our website:

[www.cii.co.uk/learning/training/](http://www.cii.co.uk/learning/training/)

## **CII Accredited third party training**

[Dive In Festival](#)

[EDII – Digital Minds](#)