5Mins.ai

Financial Services Training

Content Library





Achieve 100% Compliance in ⅓ of the Time

Stay ahead of regulatory demands with our CPD and RoSPA-accredited compliance training.

At 5Mins.ai, we make compliance effortless, fast, and engaging.

Achieve 100% Compliance in ⅓ of the Time
Thanks to microlearning, your team learns faster and retains more.

Aligned with the Latest Regulations
Always up-to-date with current government and industry standards.

Real-Time Monitoring
Assign courses, track progress, and send automated reminders with ease.

Engaging and Effective
Boost engagement by 6-10x with gamification and interactive content.

5Mins.ai



1. Financial Services Essentials

Sector training for banks, fintechs, payment firms, insurers, and investment firms.

These courses cover the rules that shape financial services across the UK, EU, Singapore, Canada, Brazil, and the UAE. Coverage spans financial crime, AML, and sanctions, FCA conduct rules and SM&CR, Consumer Duty and customer outcomes, payments and client money, operational resilience under DORA, and insurance. Built for front-office, operations, and compliance teams, each microlesson turns a complex rule into clear, practical guidance, so your people know what good conduct looks like and your firm can show it.

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Financial Services Essentials

1. Financial Crime, AML & Sanctions

Prevent, detect, and report financial crime and sanctions breaches.

6AMLD: The Sixth Anti-Money Laundering Directive (EU)
Anti-Facilitation of Tax Evasion (Global)
Anti-Money Laundering & Counter-Terrorist Financing (Brazil)
Anti-Money Laundering & Counter-Terrorist Financing (Canada)
Anti-Money Laundering & Counter-Terrorist Financing (EU)
Anti-Money Laundering & Counter-Terrorist Financing (Global)
Anti-Money Laundering & Counter-Terrorist Financing (Singapore)
Anti-Money Laundering & Counter-Terrorist Financing (UK)
Anti-Money Laundering and Counter-Terrorist Financing (EU, Netherlands)
Anti-Money Laundering and Counter-Terrorist Financing (EU, Spain)
Anti-Tax Evasion (Canada)
Anti-Tax Evasion (EU)
Anti-Tax Evasion (Global)
Anti-tax Evasion (UK)
Canada FINTRAC MSB Awareness
Canadian Sanctions Regime (SEMA / UNA)
Embargoes & Sanctions (UK)
Embargoes and Sanctions (Global)
Enhanced Due Diligence (Global)
Enhanced Due Diligence (UK)
EU Sanctions
Financial Sanctions (Global)
Financial Sanctions (UK)
FINTRAC MSB Awareness (Canada)
Introduction to Sanctions (Global)
Know Your Customer (KYC) (Global)
Know Your Customer (KYC) (UK)
Know Your Transaction (UK)
OFAC Awareness for Non-US Entities (Global)
Preventing Financial Crime (Global)
Preventing Financial Crime (UK)
Sanctions (EU)
Singapore Sanctions (MAS / UNSCR)
Suspicious Activity Reporting (Global)
Suspicious Activity Reporting (UK)
Suspicious Transaction Reporting (Global)
Third Party Due Diligence (UK)
Understanding Money Laundering, Terrorist Proliferation, Sanctions (UAE)



Financial Services Essentials

2. Conduct, Governance & Accountability

Meet conduct rules and accountability standards in every market.

- Codes of Conduct and Individual Accountability in Financial Services (UK)
- Conduct and Ethics in Financial Services (EU)
- Conduct and Ethics in Financial Services (Global)
- Conduct Rules & SM&CR - Certified Staff (UK)
- Conduct Rules & SM&CR - Senior Managers (UK)
- Conduct Rules for Individuals (UK)
- Conflict of Interest In Financial Services (UK)
- Conflicts of Interest (Global)
- FCA Appointed Representatives Responsibilities
- FCA Code of Conduct
- FCA Conduct Risk
- FCA Conduct Rules for Individual Staff
- FCA Principals and their Approved Representatives
- FCA Training & Competence
- Introduction to Financial Regulation (UK)
- Introduction to Financial Services Regulation (EU)
- Introduction to Financial Services Regulation (Global)
- Meeting the FCA Conduct Rules in Solo-regulated Firms
- Senior Management Arrangements, Systems & Controls (SYSC) (UK)
- The New Non-Financial Misconduct Rule: What Changed on 1 September 2026 (UK)
- Understanding Non-financial Misconduct (UK)
- Whistleblowing for Financial Services (Canada)
- Whistleblowing for Financial Services (EU, Netherlands)
- Whistleblowing for Financial Services (EU, Spain)
- Whistleblowing for Financial Services (Global)
- Whistleblowing for Financial Services (Singapore)
- Whistleblowing for Financial Services (UK)



Financial Services Essentials

3. Consumer Duty & Customer Outcomes

Deliver fair treatment and good outcomes for every customer.

- COBS - Client Categorisation (UK)
- COBS Client Communications (UK)
- Complaints Handling (EU, Netherlands)
- Complaints Handling (EU, Spain)
- Complaints Handling (Global)
- Complaints Handling (UK)
- Consumer Credit Regulations (CONC) (UK)
- Consumer Duty (UK)
- Consumer Duty 2026 Update: What's Changing (UK)
- Customer Vulnerability (Global)
- Dealing with Consumer Fraud (UK)
- FCA Consumer Duty
- FCA Product Governance
- FCA Regulations for Full Permission Credit Related Firms
- Financial Promotions (UK)
- Treating Customers Fairly (UK)
- Unfair, Deceptive, Or Abusive Acts Or Practices (UDAAP) (Global)
- Vulnerable Customers (FCA)
- Vulnerable Customers (Global)
- Vulnerable Customers (UK)

4. Markets, Payments & Client Money

Protect market integrity, payments, and client money.

- Canada Client Fund Safeguarding (RPAA)
- Client Fund Protection (EU)
- Client Money Protection (CASS) (UK)
- COBS - Dealing and Managing (UK)
- EU Client Fund Protection
- FCA Safeguarding for Payment and E-Money Firms
- Insider Dealing (Global)
- Insider Dealing (UK)
- Market Abuse (Global)
- Market Abuse (UK)
- Markets in Crypto-Assets Regulation (MiCA) (EU)
- MAS Payment Services Act (PSA)
- MiFID II (EU)
- Payment Arrangement and Brazilian Payment System (SPB) Regulation (Brazil)
- Payment Services Act (Singapore)
- PCI DSS (EU)
- PCI DSS (UK)
- PSD2 Awareness for EU Entities
- Safeguarding Client Money for Payment Institutions: CASS 15 (UK)
- Safeguarding Regime (FCA PS25/12)
- Singapore Client Fund Safeguarding (MAS)



Financial Services Essentials

5. Risk & Operational Resilience

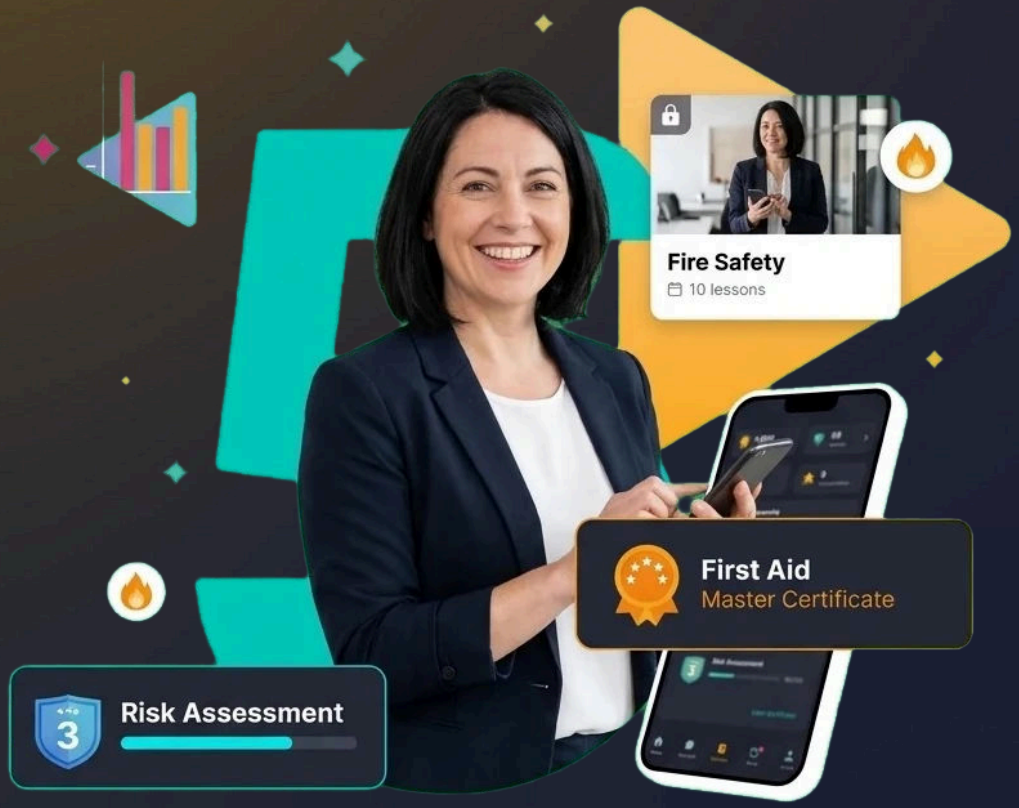
Manage risk and keep critical services running.

- Digital Operational Resilience Act (DORA) (EU)
- ESG for Financial Services (Global)
- MAS Tech Risk Management
- Operational Resilience (UK)
- Operational Risk (UK)
- Risk Appetite (Global)
- Risk Appetite (UK)
- Risk Management (UK)

6. Insurance

Meet insurance standards, from distribution to claims.

- Assessing Customer Needs in Insurance (UK)
- Brokers' Duties & TOBAs (UK)
- Claims Handling in General Insurance (UK)
- Complaints Handling (Insurance) (UK)
- Contract Certainty in Insurance (UK)
- Delegated Authority / MGA Operations Compliance (UK)
- Fit and Proper Assessments in Insurance (UK)
- Fraud Prevention and Awareness in Insurance (UK)
- General Insurance Pricing Practices / Fair Value (UK)
- Insurance Act 2015 (UK)
- Insurance Distribution Directive (IDD) (UK)
- Insurance: Conduct of Business Sourcebook (ICOBS) (UK)
- Premium Finance & Consumer Credit in Insurance (UK)
- Principles of Insurance / The UK Insurance Market
- Vulnerable Customers in Insurance (UK)



2. Health, Safety & Wellbeing

Keep every office, branch, and home workspace safe, healthy, and ready for the unexpected.

From display screen equipment and working from home to fire safety, first aid, and mental health, these courses help your people spot hazards early and respond with confidence. Coverage includes UK health and safety essentials, risk assessment, and accident reporting, alongside global and EU courses for teams in other markets. Short, practical microlessons fit around client work, and give managers the knowledge they need to support wellbeing across office-based and hybrid teams.

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Health, Safety & Wellbeing

1. Health & Safety Essentials

Build safe working habits in the office and at home.

- Accident Reporting (UK)
- Behavioural Safety (UK)
- Display Screen Equipment (Global)
- Display Screen Equipment (UK)
- Health & Safety Essentials (EU)
- Health & Safety Essentials (Global)
- Health & Safety Working From Home (EU)
- Health & Safety: The Workplace (UK)
- Health & Safety: Working from Home (Global)
- Health and Safety Essentials (UK)
- Health and Safety Level 1 (UK)
- Health and Safety: Working from Home (UK)
- Lone Working (UK)
- Risk Assessment (UK)
- Slips, Trips & Falls (UK)

2. Fire, First Aid & Emergencies

Respond calmly and correctly when an emergency happens.

- Counter-Terrorism (UK)
- Critical Incident Management (UK)
- Emergency First Aid at Work (UK)
- Fire Safety (Global)
- Fire Safety (UK)
- Fire Wardens (Global)
- Fire Wardens (UK)
- First Aid (UK)

3. Workplace Hazards & Equipment

Handle loads and equipment safely to prevent injuries.

- Manual Handling (EU)
- Manual Handling (UK)

4. Wellbeing & Mental Health

Support mental health for employees and managers.

- Mental Health Awareness for Employees (UK)
- Mental Health Awareness for Managers (UK)
- Mental Health First Aid (UK)



3. Core Compliance

The foundational compliance every employee needs, wherever your firm operates.

These global courses build the everyday compliance habits that regulators and clients expect from every employee, not just the compliance team. Coverage spans cybersecurity, data privacy, and GDPR, anti-bribery and corruption, fraud awareness, conflicts of interest, gifts and hospitality, and modern slavery, alongside harassment prevention, equality, and inclusion. Each microlesson uses real-world scenarios to turn policy into practical decisions, helping your people protect customer data, spot red flags early, and treat colleagues with respect.



Core Compliance

1. Data Protection & Cybersecurity

Protect data, systems, and people from digital threats.

- Advanced Cybersecurity Practices
- Cyber Resilience
- Cybersecurity Essentials for Employees
- Cybersecurity Essentials for IT Managers
- Data Privacy Essentials
- GDPR Essentials

2. Ethics, Fraud & Whistleblowing

Build a culture of integrity, transparency, and accountability.

- Anti-Corruption and Anti-Bribery
- Business Ethics
- Conflict of Interest
- Fraud Awareness & Prevention
- Gifts & Hospitality
- Modern Slavery

3. Workplace Conduct & Inclusion

Foster inclusive, respectful, and harassment-free workplaces.

- A Guide to Workplace Professionalism
- Conflict Management
- Creating Anti-Discrimination Workplaces
- Equality, Diversity & Inclusion in the Workplace
- Preventing Harassment in the Workplace for Employees
- Preventing Harassment in the Workplace for Managers
- Preventing Sexual Harassment
- Unconscious Bias in the Workplace

4. Governance, Risk & Business Practice

Run the business responsibly, from continuity to ESG.

- Business Continuity Planning
- Environmental, Social and Governance (ESG)
- Understanding the EU AI Act



4. Regional Compliance

Local rules for the markets you operate in, from the UK and EU to Asia and the Americas.

Financial firms rarely work under one rulebook. These courses add the local requirements that sit alongside your sector training, from UK data protection, competition law, and the Equality Act 2010 to EU whistleblowing and the Equality Directives, US harassment prevention by state, and data protection laws in Singapore, Hong Kong, and Brazil. Assign each course by region or role, so every team member learns the rules that apply where they work.



4.1 UK Compliance

1. Data Protection & Cybersecurity

Protect data, systems, and people from digital threats.

- Browsing Securely
- Cybersecurity Essentials for Employees
- Electronic Communications
- Malware and Breach Recovery
- Phishing Awareness
- Preventing Identity Theft
- UK GDPR & Data Law: The Data (Use and Access) Act 2025 Update

2. Ethics, Fraud & Whistleblowing

Build a culture of integrity, transparency, and accountability.

- Anti-corruption & Anti-bribery
- Competition Law
- Failure to Prevent Fraud Offence
- Fraud Awareness & Prevention
- Gifts & Hospitality
- Modern Slavery
- UK Competition Law
- Whistleblowing

3. Workplace Conduct & Inclusion

Foster inclusive, respectful, and harassment-free workplaces.

- Creating Anti-Discrimination Workplaces
- Disability Awareness
- Employment Rights Act for HR
- Employment Rights Act for Managers
- Equality, Diversity & Inclusion in the Workplace
- Harassment Prevention for Managers and HR: Aligning with the Worker Protection Act 2024
- Neurodiversity Awareness
- Preventing Sexual Harassment in the Workplace for Employees
- Preventing Sexual Harassment: Managers and HR
- Preventing Workplace Harassment & Bullying for Employees
- Sexual Harassment in the Workplace: The October 2026 Legal Changes
- The Equality Act 2010
- Unconscious Bias in the Workplace
- Understanding Gender Identity & Expression

4. Governance, Risk & Business Practice

Run the business responsibly, from continuity to ESG.

- Consumer Rights Act
- Corporate Governance
- Records Management
- Supply Chain Management

4.2 EU Compliance

Training aligned with European Union rules for teams across the single market.

These courses cover the EU requirements that apply beyond financial regulation: GDPR, anti-corruption and anti-bribery, fraud awareness and prevention, modern slavery, whistleblowing, and the Equality Directives. Versions for the Netherlands and Spain reflect local practice, so teams in those markets get guidance that matches where they work. Pair them with the EU courses in Financial Services Essentials, including DORA, MiCA, MiFID II, and PSD2.

EU courses

Data Protection & Cybersecurity

- GDPR Essentials

Ethics, Fraud & Whistleblowing

- Anti-Corruption and Anti-Bribery (Netherlands)
- Anti-Corruption and Anti-Bribery (Spain)
- Fraud Awareness & Prevention (Netherlands)
- Fraud Awareness & Prevention (Spain)
- Modern Slavery
- Whistleblowing

Workplace Conduct & Inclusion

- Equality Directives



4.3 US Compliance

1. Ethics, Fraud & Whistleblowing

Build a culture of integrity, transparency, and accountability.

- Foreign Corrupt Practices Act

2. Workplace Conduct & Inclusion

Foster inclusive, respectful, and harassment-free workplaces.

- Americans with Disabilities Act (ADA) for Employees
- Americans with Disabilities Act (ADA) for Employers
- Code of Conduct & Ethics
- Harassment Prevention Training - Illinois
- Harassment Prevention Training - Maine
- Harassment Prevention Training - Washington
- Prevención del Acoso Laboral: Empleados (EE.UU)
- Preventing Harassment: Employees (all states)
- Preventing Harassment: Employees (California) Refresher
- Preventing Harassment: Employees (Colorado)
- Preventing Harassment: Employees (Connecticut) Refresher
- Preventing Harassment: Employees (Delaware)
- Preventing Harassment: Employees (New York)
- Preventing Harassment: Supervisors/Managers (all states)
- Preventing Harassment: Supervisors/Managers (California) Refresher
- Preventing Harassment: Supervisors/Managers (Colorado)
- Preventing Harassment: Supervisors/Managers (Connecticut) Refresher
- Preventing Harassment: Supervisors/Managers (Delaware)
- Preventing Harassment: Supervisors/Managers (New York)
- Preventing Sexual Harassment: Employees (California)

4.4 Singapore Compliance

Training aligned with Singapore's regulatory framework. These courses cover the Personal Data Protection Act (PDPA), anti-corruption and anti-bribery, and fraud awareness and prevention. Pair them with the MAS courses in Financial Services Essentials, from tech risk management and the Payment Services Act to client fund safeguarding and sanctions.

Singapore courses



Data Protection & Cybersecurity

Personal Data Protection Act (PDPA)

Ethics, Fraud & Whistleblowing

Anti-Corruption & Anti-Bribery

Fraud Awareness & Prevention

4.5 Hong Kong Compliance

Training aligned with Hong Kong's data protection framework. The Personal Data Protection Ordinance (PDPO) course shows teams in Hong Kong how personal data can be collected, used, stored, and shared, so they handle customer and colleague information lawfully and know what to do if something goes wrong.

Hong Kong courses



Personal Data Protection Ordinance (PDPO)

4.6 Brazil Compliance

Training aligned with Brazil's regulatory framework. These courses cover the Brazilian General Data Protection Law (LGPD) and customer service and consumer protection, helping teams in Brazil handle personal data lawfully and treat customers fairly. Pair them with the Brazilian Payment System (SPB) and anti-money laundering courses in Financial Services Essentials.

Brazil courses



Data Protection & Cybersecurity

Brazilian General Data Protection Law (LGPD)

Governance, Risk & Business Practice

Customer Service & Consumer Protection

4.7 Canada Compliance

Focused on the ethics standards that apply in Canada. The anti-corruption and anti-bribery course helps teams in the Canadian market recognize bribery risks and act with integrity. Pair it with the Canadian courses in Financial Services Essentials, covering FINTRAC MSB awareness, anti-money laundering, sanctions, client fund safeguarding (RPAA), and whistleblowing.

Canada courses



Anti-Corruption & Anti-Bribery

4.8 UAE Compliance

Training aligned with United Arab Emirates requirements.

These courses help teams in the UAE raise concerns safely and treat customers fairly, with practical guidance on whistleblowing and consumer protection. Pair them with the UAE financial crime course in Financial Services Essentials, which covers money laundering, terrorist proliferation, and sanctions, so people working in the UAE understand both their conduct duties and the financial crime risks they need to report.

UAE courses



Ethics, Fraud & Whistleblowing

Whistleblowing

Governance, Risk & Business Practice

Consumer Protection



5. Leadership & Management

Turn high performers into managers people want to work for.

Strong conduct cultures start with strong managers. These courses help new and experienced leaders build teams that thrive, set direction, coach people, and make performance a habit, with a development series built for finance teams. Practical microlessons also cover the hard moments, from difficult conversations and resolving conflict to leading people through change, so managers can apply what they learn the same day and lead with integrity and ethics.



Leadership & Management

1. Grow as a leader

Build the mindset, presence, and core skills of a confident leader.

- Advanced leadership skills for experienced managers
- Building executive presence
- Confident Communication
- Confident, decisive leadership
- Core leadership competencies
- Developing EQ
- Emerging leaders pathway
- Exhibiting a Growth Mindset: Leading by Example
- From team member to team leader
- Getting the best from different personalities
- Know your leadership style
- Leadership for finance teams: development series
- Leading a customer-focused team
- Leading for innovation
- Leading with integrity and ethics
- Mastering Performance Conversations
- Navigating Conflict
- Setting and Achieving Goals
- Shared leadership: leading together
- Stepping Into Leadership
- The Art of People Management
- The fundamentals of great leadership
- The manager's playbook
- The Power of 1:1s
- Think Smarter: A Practical Guide to Critical Thinking
- Thinking like a leader
- Transformational leadership

2. Build teams that thrive

Create inclusive teams where people feel safe to speak up.

- Building inclusive teams
- Creating a Culture of Psychological Safety
- Creating a Positive Working Environment: A Leader's Guide
- Diversity, equity, and inclusion for leaders
- Emotionally intelligent leadership
- Growing your team from forming to performing
- Hiring and interviewing fairly
- How to Look After your Team's Wellbeing
- How to Motivate your Team
- Leading remote and hybrid teams
- Leading with empathy
- Master Your Time, Multiply Your Impact: A Leader's Guide
- Mastering Delegation: Leading with Clarity and Trust
- Personality-Driven Leadership: Leveraging Individual Strengths for Team Success
- Psychological safety: making it safe to speak up
- Setting Team Direction: From Vision to Victory
- Shaping a positive team culture
- Sharing the Vision: Leading Through Clear Direction
- Team leadership from beginner to expert
- Team meetings worth turning up to
- Team-building tools and activities
- The Culture Code: Creating a Collaborative Environment for Team Success
- The Empathetic Leader: Fostering Compassionate Leadership
- Trusted leadership: building credibility with your team
- Understanding and Managing Different Generations
- What high-performing teams do differently



Leadership & Management

3. Make performance a habit

Set goals, give feedback, and develop people all year.

A Leader's Guide to Holding Your People Accountable
Accountability without micromanaging
Delegation that frees up your time
Delivering tough feedback with care
Developing and keeping great people
Driving Team Performance: The Leader's Compass
Feedback that helps people grow
Foundations of Performance Management
Getting results through others
How to Give Uncomfortable Feedback
How to Have Effective 1-1s
Leading high-volume service teams
Managing performance all year round
Managing up, down, and across
Master Coaching Strategies for Optimal Performance
Mastering Feedback - Practical Models and Techniques
Mastering Performance Management
One-to-ones that move people forward
Performance conversations that land
Running fair and useful appraisals
Strategic Performance Management and Team Development
Succession planning that works
Tackling underperformance early and fairly
Talking careers with your team
Team goals and OKRs
The essentials of managing people
The performance review toolkit

4. Set direction and influence

Set a clear vision, make decisions, and bring people with you.

Big-picture thinking for leaders
Building a Leadership Mindset
Building a team of problem solvers
Commercial acumen for managers
Data-informed people decisions
From strategy to plan
Getting your message across as a leader
How to Influence Without Authority
How to Manage Meetings Efficiently
Influence without authority
Leaders who listen
Leadership Styles & Communication & Self-Awareness
Listen to Lead: The Power of Listening in Effective Leadership
Listen Up: Mastering the Art of Active Listening
Making the call: decision-making for leaders
Setting a clear vision and direction
Strategic leadership: scaling your impact
The Connected Leader: Managing Remote & Hybrid Teams
Top Communication Tips for Leaders



Leadership & Management

5. Lead through the hard moments

Lead with steadiness through change, conflict, and pressure.

- Difficult conversations for managers
- Leading AI-enabled teams
- Leading people through change
- Leading through uncertainty
- Managing a leader's workload
- Managing Mental Health for Leaders
- Managing Stress and Building Resilience as a Leader
- Resolving conflict in your team
- Staying well while leading others
- The adaptable leader

6. Coach and energize people

Coach, mentor, and motivate people to raise performance.

- Coaching mastery, step by step
- Coaching to raise performance
- Making mentoring work
- Motivating and engaging your team
- The coaching manager



6. Soft Skills

Build the everyday skills that earn client trust and help teams work better.

Technical knowledge wins the meeting. Soft skills win the relationship. These courses build the skills client-facing and back-office teams use every day, from clear writing and active listening to handling difficult customers and complaints, negotiation, and stakeholder management. Learners also build personal effectiveness, resilience, and problem solving, so they stay productive under pressure, adapt to change, and work well with colleagues across offices, cultures, and hybrid teams.



Soft Skills

1. Communicate so it lands

Write, speak, and present so your message is understood.

- Active listening skills
- Adapting to different communication styles
- Asking better questions
- Body language and tone
- Clear business and report writing
- Data storytelling for non-specialists
- People skills for specialist roles
- Presenting and public speaking with impact
- Soft skills starter kit
- Speak with clarity and conviction
- Storytelling that connects
- Working across cultures
- Workplace communication essentials
- Writing emails that get read
- Your elevator pitch in 60 seconds

2. Influence and serve

Persuade, negotiate, and serve clients and stakeholders well.

- Communicating with clients
- Delivering excellent customer service
- Handling difficult customers and complaints
- Negotiation skills for win-win outcomes
- Stakeholder management in practice
- Winning people over: persuasion skills

3. Work better with people

Build trust, handle tough conversations, and collaborate well.

- Building strong working relationships
- Building trust with colleagues
- EQ essentials: understanding emotions at work
- Facilitating productive discussions
- Giving and receiving feedback well
- Making a great first impression
- Meetings that get things done
- Raising awkward issues honestly
- Seeing it their way: practical empathy
- Small talk and conversation skills
- Thriving in hybrid work
- Tough conversations made easier
- Working better together
- Working through disagreements

4. Stay well under pressure

Manage stress, build resilience, and avoid burnout.

- Bouncing back: personal resilience
- Looking after your mental health
- Managing stress at work
- Mindfulness for a calmer workday
- Setting boundaries and avoiding burnout
- Sleep, nutrition, and energy for better work

Soft Skills

5. Customer Service

Deliver service that keeps customers happy and coming back.

- Building Bridges: The Art of Customer Relationships
- Confident Communication: Difficult Conversations Made Easy
- Creating a Connection
- Customer Empathy Guide
- Customer Service Excellence: A Comprehensive Guide for Contact Centre Professionals
- Customer Service Toolbox For Leaders
- Dealing With Upset Customers
- Delight Every Customer Guide
- Delivering Digital Customer Service
- Mastering the Art of Tech Support and Customer Solutions
- Problem-Solving 101
- Transformative Tactics for Contact Centre Leaders
- Ultimate Customer Happiness: Communication & Listening

6. Think, solve and adapt

Think critically, solve problems, and adapt to change.

- Creative thinking for everyday innovation
- Critical thinking in practice
- Design thinking for teams
- Embracing change at work
- Human judgement when using AI
- Navigating ambiguity at work
- Practical problem solving
- Smarter everyday decisions

7. Own your momentum

Manage time, focus, and confidence to get the right things done.

- Beating procrastination
- Building habits that stick
- Building self-confidence at work
- Deep focus in a distracted world
- Developing a growth mindset
- Getting more done: personal productivity
- Managing yourself: personal effectiveness
- Overcoming the fear of failure
- Owning your career growth
- Professionalism at work
- SMART goal setting for everyone
- Speaking up assertively
- Taking ownership at work
- Taming your inbox
- Time management and prioritization



7. AI Academy

Help every team use AI safely, confidently, and productively.

AI is changing how financial firms serve clients, manage risk, and run operations. These courses build practical AI skills across the business, from AI fundamentals, prompt engineering, and responsible use to hands-on training in ChatGPT, Claude, Copilot, and Gemini. Learners see how to evaluate AI outputs and protect privacy and data, while leaders learn about AI governance and risk, so your firm can adopt AI with confidence and keep human judgment where it matters.

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AI Academy

1. AI Fundamentals

Understand how AI works and use it responsibly and effectively.

A Short Guide to Using AI Responsibly
Advanced Prompt Engineering
AI 101: Prompt Engineering
AI Academy: Privacy & Stewardship
AI Academy: Problem Solving and Decision-Making with AI
AI Agents & Automation
AI Governance and Global Regulation
AI Literacy: Bias, Risk, and Responsibility
AI Literacy: Understanding How AI Works
AI Playbook 101
Claude 101
Develop a Critical Eye for AI
Evaluating AI Outputs
Privacy, Data Protection & IP in the Age of AI
Prompt Engineering & Effective AI Communication
Prompt Engineering Fundamentals
Understanding AI: Core Concepts Explained

2. AI Tools

Get hands-on with ChatGPT, Claude, Copilot, Gemini, and NotebookLM.

A Complete Guide to ChatGPT
A Guide to Claude for Non-coders
ChatGPT Top Tips, Agents & Automation
Claude Code Mastery
Copilot Fundamentals
Copilot in Excel
Copilot in Outlook
Copilot in Powerpoint
Copilot in Teams
Copilot in Word
Copilot Prompting Mastery
Gemini Fundamentals
Getting Started With NotebookLM
Mastering ChatGPT & Generative AI: Concepts to Applications
Work Smarter With Co-Pilot

AI Academy

3. Strategy & Business

Apply AI to strategy, customers, sales, finance, and HR.

- AI Business Applications & Future Trends
- AI Literacy for Leaders: Risk Management, Ethics, and Governance
- AI Literacy: A Foundational Toolkit for Leaders
- AI-Driven Business Development
- ChatGPT & Generative AI for Creating Effortless CX
- ChatGPT & Generative AI for Customer Experience
- ChatGPT & Generative AI for Finance Professionals
- ChatGPT & Generative AI for HR
- ChatGPT & Generative AI for L&D
- ChatGPT & Generative AI for Ops & Strategy
- ChatGPT & Generative AI for Sales
- ChatGPT & Generative AI for Sales: Drive More Opportunities
- Generative AI & ChatGPT for Winning Sales Strategies
- Leveraging ChatGPT & Generative AI for Leaders
- The Role of AI in Product Management
- Using AI to Improve Your Learning Design

4. Research & Analysis

Use AI to analyze markets, feedback, and performance data.

- AI-Driven Market Insights and Competitor Analysis
- AI-Powered Survey & Performance Analysis That Saves 20+ Hours Per Month
- Streamlining Feedback and Survey Analysis with AI

5. Creative Generation

Use AI to generate ideas, copy, images, and video.

- AI in Branding & Copywriting
- Enhancing Ideation and Innovation with AI
- Gemini Image & Video Generation
- Generative AI for Marketing: Revolutionize Your Strategies in Minutes
- Mastering AI Copywriting: Transform Your Words into Impact

6. Development & Coding

Build apps and code faster with AI assistants.

- Cursor AI for App Building
- The GitHub Copilot Playbook

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