

Elevating Performance Through People

Davies – People Development

People Development

Organisations are facing the most transformative period in history

We help you address the challenges that this creates



Industry Challenges

Harnessing AI & Technology

Pace of Change

Skills Shortage

How Davies addresses these challenges



Davies elevates performance through people

Unlocking Technical Expert Impact

We transform specialists into strategic influencers with measurable impact

Emerging Talent & Apprenticeships

We close critical skills gaps and develop the capability of your workforce

Career Pathways & Succession

We create talent pipelines to plan for the future

People Change & Culture

We increase organisational change capability & drive cultural evolution

Building AI Capability

We help to develop fluency and understanding of how to best use

Leadership & Core Capabilities

We build leadership excellence at every level of your organisation

Professional Qualifications & CPD

We build critical expertise and accredit individuals in regulated business areas

Operational Excellence

We deliver learning solutions that support technology adoption, enhanced processes and regulatory compliance

Workforce Evolution

To create the conditions for success, organisations must reshape their approach to talent, skills, organisational design, culture and resource planning for a hybrid human and AI future

Davies People Development overview

Our mission is to elevate organisational performance through people. We transform how Financial Services firms source, upskill, develop and retain talent – ensuring they're people, skills, and technology are fit for the future. Our services support any change agenda.



Advisory Services to drive impactful change

We redesign workforce strategies for the future – aligning operating models with the right people, capabilities, ways of working and incentives.

Using technology, we drive strategic resource planning that shapes career frameworks, change initiatives, performance management, talent development and a high-performance culture.



Emerging Talent: Attraction & Skills Development

We are **Emerging Talent specialists** – supporting firms with recruitment & tailored programmes.

We help firms leverage the UK
Apprenticeship Levy, access
appropriate funding or offer
commercial programmes globally.
Our programmes deliver
internationally recognised
professional qualifications, build
critical skills and behaviours and
embed CPD through our Study
Solutions & Academies.



Developing Experts and Leaders

Davies helps firms unlock leadership potential and drive high performance.

Our Leadership programmes strengthen leaders to lead change and build high performing teams.

Our **Technical Experts** programmes supports specialists at key career stages to maximise their impact and value.



Operational Excellence through embedded learning

Davies helps firms **embed operational excellence** through learning experiences that align people, process, and performance.

Our **contextualised training** fits into real workflows and reflects how people truly learn – driving lasting, meaningful change.

Co-designed with clients, our interventions build future-ready skills that stick.

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Emerging Talent Solutions in more detail

Specialist Recruitment Services

Utilising our extensive networks and expertise Davies creates comprehensive career attraction and recruitment campaigns

Attract

Source

Recruit

Assess

Deploy

English Apprenticeships

We utilise the Apprenticeship Levy for England based employees; we can also create commercially funded global programmes to maintain consistency in training across the workforce

Compliance & Risk Officer Level 3

Insurance Practitioner Level 3 (UW, Loss Adjuster, Junior Broker)

Financial Adviser / Paraplanner Level 4

Counter Fraud Specialist Level 4

Insurance Professional Level 4

Business Administrator Level 3

Financial Services Administrator Level 3

Senior Insurance Professional Level 6

Sales Executive Level 4

Senior Compliance & Risk Specialist Level 6

Junior Management Consultant Level 4

Senior Financial Services Customer Adviser Level 3

Digital revision resources designed to support learning towards Industry



qualifications. Providing a blend of eLearning, podcast, revision cards, workshop recordings and mock papers



Study Support

Additional industry qualifications supported

We recognise the importance of relevant qualifications and are trusted delivery partners for these Awarding Organisations

Study Solutions - Chartered Insurance Institute

CII Foundation in Insurance Test, CII Certificate in Insurance, *CII Diploma In Insurance, *CII Advanced Diploma in Insurance

*Resources will vary depending on units selected – new resources are being developed continuously

Diploma in Regulated Financial Planning

Level 4 DipFS

Units R01 - R02 - R03 - R04 - R05 - R06

Advanced Diploma in Financial Planning

Level 6

Units AF1- AF4 - AF5 - AF7 - AF8 J02 - J05 - J10 - J12

Long Term Care

Level 3 Award

Insurance

Institute

Unit CF8

Mortgage Adviser

Level 3 Certificate Award

Units CF1 – CF6 – R01

Financial Administrator

Level 3 Award

Units CF1 - FA2

Equity Release

Level 3 Certificate

Unit ER1

Qualifications in Retail & Commercial Banking, Green & Sustainable Finance, Digital Finance

Certificates

Any of the ICA Certificates

Advanced Certificates

Any of the ICA Advanced Certificates

ICA Diplomas & Post Graduate Diplomas

Any of the ICA Diplomas





People Development Solutions in more detail

Leadership Programmes

Davies support by creating expertly crafted Leadership Programmes aligned to your context, culture and aspirations. By inspiring leaders to behave differently through guided development, we help leaders to translate knowledge into practical application and drive impact in the workplace.



Technical Experts Programmes

Davies develop your **Technical Experts** with key attributes and behaviours which will enable them to navigate risks, seize opportunities, and lead initiatives that align with long-term strategy. Maximising the strategic use of your experts and their specialisms drive organisational high performance.



Supporting Workforce Evolution

Davies support firms to future-proof their workforce by designing tailored **Workforce Evolution Strategies** that integrate upskilling, agility, and innovation. These align people, capabilities, and incentives with high-level operating models to drive lasting success.



Supporting People Change

We drive **People - Led Transformation** by equipping individuals to **embrace change** through Leadership Activation, Cultural Evolution, and Sustainable Implementation. Our approach delivers a threefold improvement in time, cost, scope control, and overall change value.



Embedding Operational Excellence

Davies create **embedded tailored learning interventions** which help your people fulfil their roles with true customer centricity, drive higher performance. Our learning consistently closes capability gaps, improves agility, and elevates mandatory compliance training to embed accountability, not just awareness.



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Why Davies are well positioned to solve industry challenges

Our specialism and immersion in the financial services industry, allows us to share our experience, expertise and insights with our clients and partners

Davies brings over three decades of distinguished expertise in designing awardwinning learning experiences for our global clients

Each year, we provide development and coaching to over 2,000 individuals, with more than 1,800 actively engaged in one of our structured development programmes

We leverage cutting-edge learning technologies and innovative approaches to design impactful, meaningful learning experiences that elevate performance

Allianz (II)











>8,500

Global colleagues

>20

Countries

>1,700 Clients





Case Studies

Innovative, insightful and committed to impact and improvement through people development

Enabling Talented Engineers at Top Tier Bank to fulfil their potential

Davies has partnered with a leading Global Bank since 2010 to deliver a range of leadership and engineering development programmes, including the flagship Enterprise Engineer Programme (EEP). These initiatives have trained over 2,000 technologists globally, improved collaboration and retention, and strengthened alignment between engineering and business strategy. With over 50 programmes delivered and consistently high participant feedback, the collaboration has played a key role in building a high-performing engineering culture at the Bank.

Upskilling talent in a UK Pensions business

Davies partnered with a growing pensions organisation to redefine its Employee Value Proposition and align its people strategy with a new operating model, consolidated into a clear HR roadmap. To build internal capability, Davies delivered development programmes including Equip to Manage, Inner Strength events, Future Leader, and mentoring. This has created a strong succession pipeline, improved cross-team collaboration, and fostered a culture focused on wellbeing and performance—preparing the organisation for its next phase of growth.

Transforming Compliance & Risk Talent at a UK High Street Bank

Davies partnered with a leading UK high street Bank to transform its Compliance & Risk function by creating a structured career pathway from entry-level to advanced roles. This initiative improved talent attraction and retention by aligning learning with the Apprenticeship Levy and the Compliance & Risk Level 3 apprenticeship. Participants receive expert coaching, skills development, and a recognised qualification from the International Compliance Association—building a future-ready compliance workforce. The programme's success has led to progression onto the Level 6 Apprenticeship and repeat cohorts of Level 3 talent.



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