



Continuing Professional Development Handbook



Version: 2021.2

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1. Introduction

1.1. Handbook Purpose

This handbook provides a detailed description of LCS CPD and serves as the definitive reference guide for those registered. It defines CPD, describes the LCS approach to CPD and explains how the various components work.

The Handbook is updated periodically and the latest version is in the CPD Help section.

1.2. What is Continual Professional Development?

- It is the process of logging and documenting the skills, knowledge and experience that you gain formally and informally as you work.
- It is a commitment towards the enhancement of personal skills and proficiency throughout your career.

The CPD process helps you manage your personal development continuously and provides a mechanism to help you record, review and reflect on what you practice and learn. LCS CPD combines different routes for competency development - for example, implementation activities, training, workshops, conferences, research, projects, teaching and writing.

CPD is self directed, driven by the practitioner, not his or her employer or advisor.

1.3. LCS CPD

1.3.1. How LCS CPD Works

CPD is available for those with LCS **Premium Practitioner Membership (PPM)**. A LCS Standard Practitioner Member can upgrade to PPM for a small fee and then opt to register for CPD.

This allows you to embark on an personal development cycle involving the creation of a development plan, the logging of development activities and the periodic self-assessment of progress towards development goals.

When registered for LCS CPD you receive a CPD certificate and your personal website member profile indicates your PPM and CPD status.

An LCS assessor approves your development plan and endorses up to three periodic self-assessed progress checks. When you have completed your cycle, your plan is endorsed and archived and you can seamlessly start another cycle, providing your PPM is still valid.

"Scientific thinkers are clear as to the purpose at hand and the question at issue. They question information, conclusions, and points of view. They strive to be accurate, precise and relevant. They seek to think beneath the surface, to be logical and objective. They apply these skills to their reading and writing as well as to their speaking and listening. They apply them in their personal and professional life"

The Thinker's Guide to Critical Thinking.



1.3.2. How LCS CPD Differs

LCS CPD differs from most CPD programmes in the following ways:

- **Its use of the Plan-do-Check-Act (PDCA¹) model.**
 - Scientific thinking is at the core of lean thinking, so it makes sense to build a CPD model using the classic scientific thinking framework: Plan-Do-Check-Act.
 - This provides a robustness and rigour to the development process itself, as well as honing your expertise in using A3s.
- **It includes three core development elements.**
 - Whereas many CPD schemes just focus on learning, LCS CPD has three elements - practice, learning and communication - as it considers capability in an holistic way involving each of these.
- **It requires an evidence based self-evaluation of progress.**
 - Many CPD schemes use a score or credit based system, whereby participants collect 'points' for attending courses, events and so on. When they reach a

LCS CPD not only signals to the lean community that you are professionally developing in a rounded way, but it also makes you apply PDCA principles to your personal development planning and develops your capability in using A3's.

¹ PDCA is sometimes referred to as PDSA - plan-do-**study**-act, or plan-do-study-**adjust**

certain number of points, they are deemed to have crossed a CPD threshold and therefore sufficiently professionally developed .

- LCS CPD considers that self evaluation, corroborated by documented evidence is a robust method of gauging development, which is a relative measure taking into account your start point and end point.

1.3.3. The LCS CPD Model

The LCS CPD model is built around PDCA.

Plan

You create an A3 development plan which includes:

- a **vision** of your future competence as a lean practitioner;
- your **current situation** with regard to both your effectiveness and strengths and your gaps and opportunities;
- your **goals & targets** for your 'target condition' when you have completed the plan. and
- your high level **countermeasures** to close the **gaps** between your **current situation** and your **target condition**.

You then decide on a set of **high level countermeasures** which will comprise various types of activities that you plan to Do, Log and Check and Reflect upon.



Do

The **Do** phase takes place throughout the cycle and, importantly, consists of three types of activities: learning, practicing and communicating.

Practicing is about using your skills in the workplace, applying knowledge learned and engaging in an activity for the purpose of improving something, solving problems. For example:

- Undertaking specific CI projects.
- Participating in improvement events.
- Activities involved in fulfilling the requirements of a lean/CI focused job or role.

Learning is about acquiring lean oriented knowledge or skills through formal education, training, study and on the job experience. For example:

- Participating in formal training courses

- Undertaking further or higher education
- Attending conferences, seminars, workshops
- Reading
- Researching
- Observation

Communicating is about sharing opinions, exchanging or imparting knowledge among colleagues, networks, communities or organisations. Communicating is sub divided into SHARING KNOWLEDGE and TEACHING & GUIDING.

Sharing Knowledge:

- Writing articles, blogs etc
- Making presentations, delivering briefings

Teaching & Guiding:

- Facilitating
- Coaching
- Instructing
- Mentoring
- Lecturing

Check

Reflecting is about contemplating your learning and experiences and essentially asking the question, “what did I get out of this?” It involves critical thinking and critical reflection.

Note that reflection is an ongoing process at an informal level, though in LCS CPD there are several checkpoints when more formal reflections take place.

Act

The Act stage is when you periodically check that the plan is on course. Various changes may impact the plan, such as new opportunities that have arisen, a change in priorities (by you or your organisation).

If necessary, the plan can be adjusted to take account of these.

When you reflect on each CPD activity, you should answer these questions:

- What did I learn from it?
- How will I use this learning?
- What further action will I take?

1.4. The CPD Digital Platform

1.4.1 Digital Delivery

LCS CPD is entirely digitally delivered and managed, using a unique, specially developed facility based on the LCS website. The various CPD elements are carefully integrated, making the process flow, easy to access and simple to use.

The CPD platform is accessed from the member’s account area with a drop down menu from which you are a click away from creating your A3 plan, logging a CPD activity or undertaking a progress assessment check.

1.4.2 The CPD Dashboard

The member profile page contains your digital credentials and is where you access your **CPD dashboard**, which neatly collates key information about your CPD progress and activities.

The dashboard contents are revealed as you progress through your CPD cycle, developing your plan, undertaking activities, progress checking and obtaining approvals and endorsements.

The screenshot displays the 'Member Profile' page for Angus McDonald. The profile includes a cartoon avatar, name, title (CI Manager, ABC Developments), and membership start date (October 2020). It also shows social media icons and a 'CPD Registered' badge. Below the profile is the 'Continuous Professional Development' section, which explains that CPD is the process of tracking and documenting skills, knowledge, and experience. The dashboard is divided into several key areas:

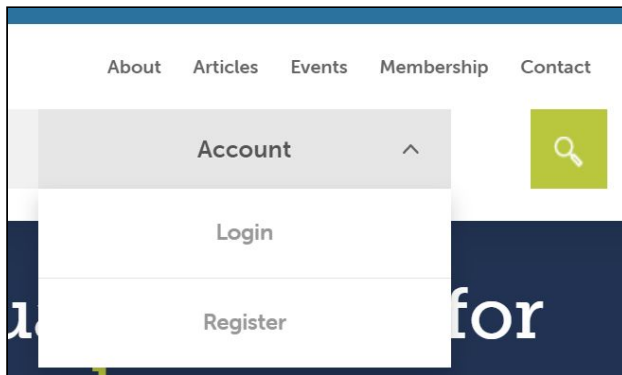
- Annual A3 Plan:** Shows the 'Angus plan 2022' with a plan period from November 2020 to November 2021, updated on 17/11/2020. A 'View Plan' button is available.
- Activity Log:** Displays 'Activity #6' with a description of a quarterly meeting, a date of 27/10/2020 - 27/10/2020, and an A3 Plan Reference of C2: Communicating. A 'View Activity Log' button is present.
- Progress Check Record:** Shows a progress indicator of 17% complete. It notes that it is Month 1 of the CPD year and that the user has currently completed 17% of their activities. A 'View Check Record' button is provided.
- Notifications:** A prominent notification states 'Your plan has been approved!' and 'Your Assessor has completed their review and has approved your Annual A3 Plan'. It encourages the user to begin their CPD Activity Log and includes a 'View Activity Log' button.
- Comments:** A comment from an assessor praises the plan as well-thought-out and realistic, suggesting more quantification for future iterations. The comment is dated 17/11/2020 at 17:00:08.

From the dashboard you can view and edit your latest A3 plan, see your latest CPD activity and view your activity log, see how well you are progressing towards your goals, check on your latest notifications and comments from the assessors.

1.4.3 Your LCS Website Profile

You need to be an LCS Premium Practitioner Member to access CPD, which requires an annual fee to be paid.

To set this up, go to any LCS web page and click **Account**, then click **Register**. You can become a Standard Practitioner Member if you already have an LCS qualification, otherwise you can become a Guest Member.



Once you have upgraded to Premium Practitioner Member (PPM) you automatically gain access to CPD, you can begin your CPD process. Your new membership and CPD status is displayed in your member profile.



1.5. Personal Commitment & Responsibility

1.5.1. Self Directed Principle

Making a success of LCS CPD requires self discipline and a commitment to managing your personal development in a lean way. You are expected to drive the process and develop a CPD routine that maintains its momentum and ensures you make the most of the opportunity.

The process is designed to be not too onerous and the LCS welcomes feedback so it can continue to improve all aspects (via membership@leancompetency.org).

Ultimately, LCS CPD must be considered to add value to your personal development in terms of helping you define and achieve appropriate goals more effectively.

1.5.2. Support

The self directed principle means that you should not require a great deal of support, though the LCS is available to answer queries and deal with unexpected issues, though its role is not to provide an advisory, mentoring or counselling service. There are also numerous help facilities on the CPD web pages.

Informal support may be available from the CPD community, through mechanisms such as web forums and discussion groups.

You may have a workplace or personal mentor and this person should be ideally placed to discuss your development and support you in the process - in particular, when developing your A3 plan. This may also link in with your organisation's HRM personal development review and appraisal practices.

1.5.3. How much time do I need to spend on CPD?

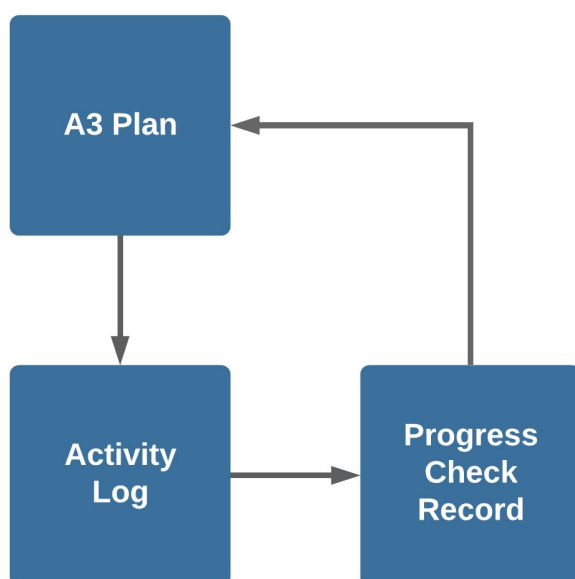
LCS CPD is designed to be relatively easy to manage. The development of your A3 plan requires some quality thinking time, though once this is finished, you should take no more than 20 to 30 minutes per week on CPD updating.

1.6. Confidentiality

The LCS treats all personal information received through CPD in confidence and only LCS CPD assessors have access to it. No information is divulged outside the LCS organisation. See the [LCS Privacy Policy & Data Protection](#).

2. The CPD Process

2.1. The CPD Elements



The CPD process revolves around the three **CPD elements**, which are used for creating your plan and managing your CPD activity:

1. [The A3 plan](#)
2. [The ongoing activity log](#)
3. [The progress check record](#)

There is a cyclical flow among the three elements:

- CPD starts with the A3 plan, which feeds into the Activity Log.
- The Activity Log links to the Progress Check Record.
- The Progress Check Record, in turn, feeds into the next iteration of the A3 plan.

The CPD elements are accessed from your personal profile area on the LCS website, which you regularly access during the CPD cycle.

Each is described in detail in the following sections.

2.2. The Stages in the CPD Cycle

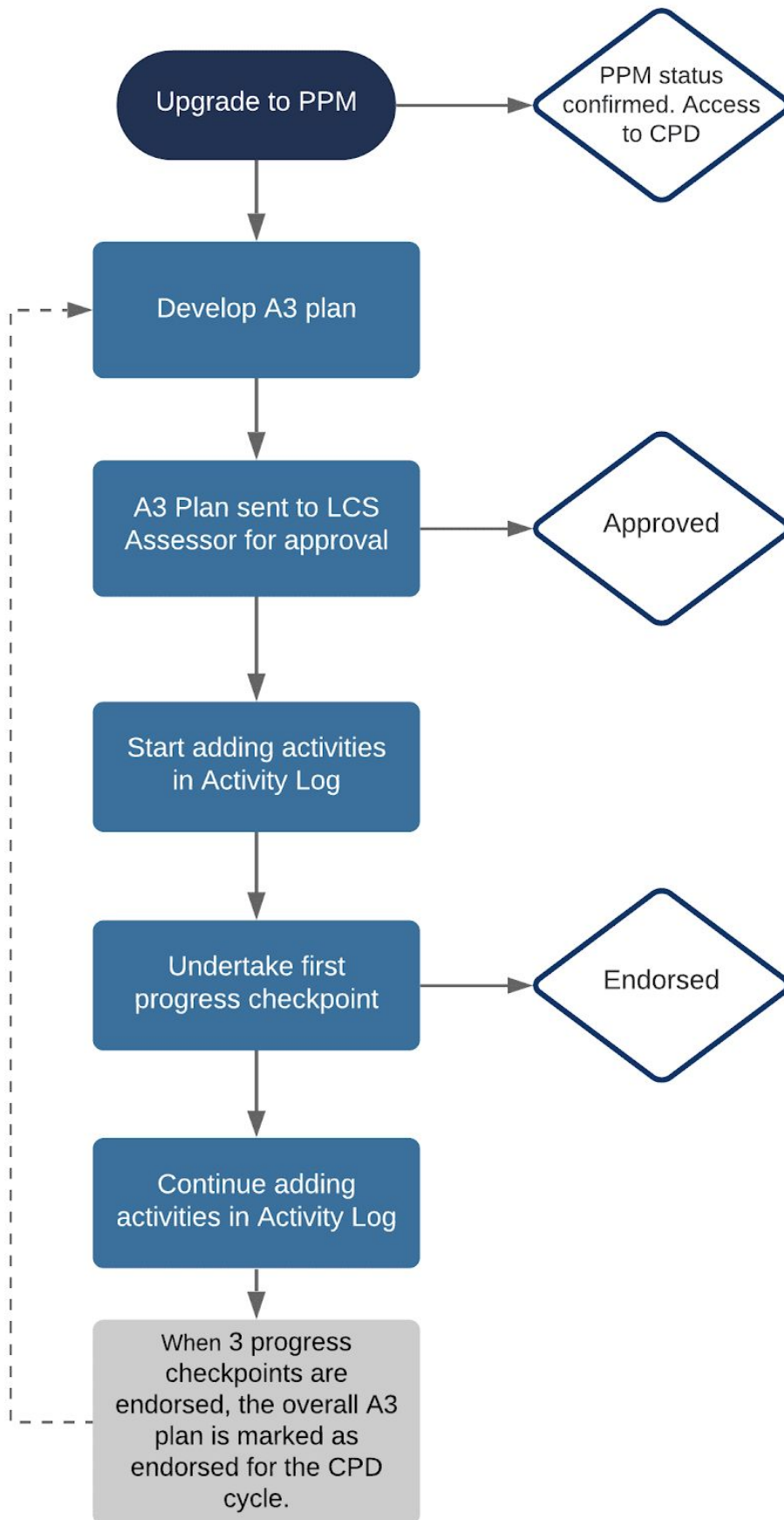
2.2.1. Introduction

CPD is, by definition, an ongoing process and for practical purposes it often runs on an annual cycle, which allows for a formal point of review and confirmation.

However, a practitioner may complete a cycle in less than 12 months, which can be accommodated by the LCS CPD system. In this case, a second CPD cycle may start within a 12 month period.

The sections below describe how CPD is accessed and lists the stages in the first cycle of CPD activity.

The process overview is as follows:



2.2.2. Setting Up

1. The LCS member upgrades to become a Premium Practitioner Member (PPM).
2. PPM status is confirmed allowing access to the CPD facility, which automatically appears in the member's account profile.

2.2.3. CPD Activity Overview - First Cycle

1. The PPM completes an A3 Plan
2. The PPM sends the A3 Plan to LCS Assessor for approval
3. The Assessor either approves or rejects it, leaving a comment.
4. After approval, the PPM can now start regularly logging CPD activities The PPM has 12 months to complete your CPD cycle from the date the PPM starts.
5. At periodic checkpoints (eg 4 monthly), the PPM performs an assessment of progress using the Progress Check Record and submits it to the LCS Assessor for endorsement.
6. The Assessor reviews the Progress Check Record. If it is accepted, it is endorsed and the next progress record for the PPM is created. If it is not yet acceptable, it is not endorsed and a comment is added to the A3 Plan.
7. In most cases, when three progress checkpoints have been endorsed, the overall A3 plan is marked as endorsed for that CPD cycle.
8. A new A3 plan is made available for the next cycle.

2.3 Reviewing, Editing & Endorsing

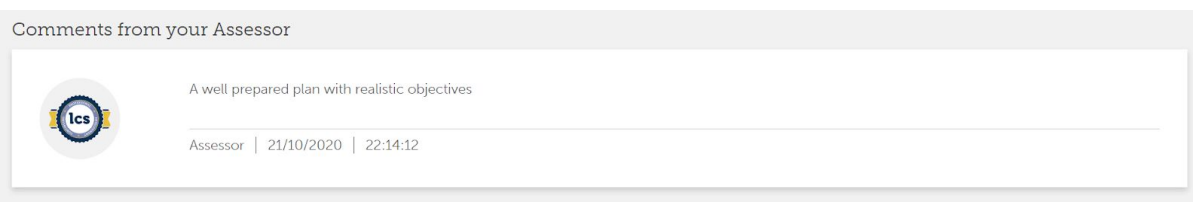
2.3.1. Commenting, Approving & Endorsement

Your A3 plan and periodic checkpoint reviews are reviewed by LCS assessors to ensure that they are appropriate.

The assessors perform three activities:

1. Commenting
2. Approving
3. Endorsing

For the A3 plan the assessor may use the **comment** facility, enabling a specific comment or question to be made.




Assessors **approve** your A3 plan, then **endorse** your periodic self-assessments and the final year end position.

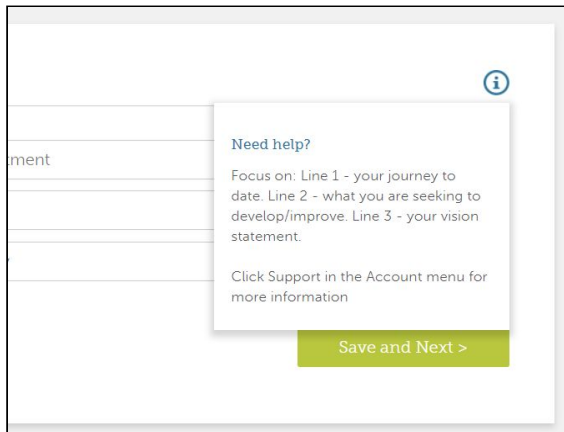
2.4 Renewing PPM

After 12 months you can renew your PPM and continue your CPD cycles.

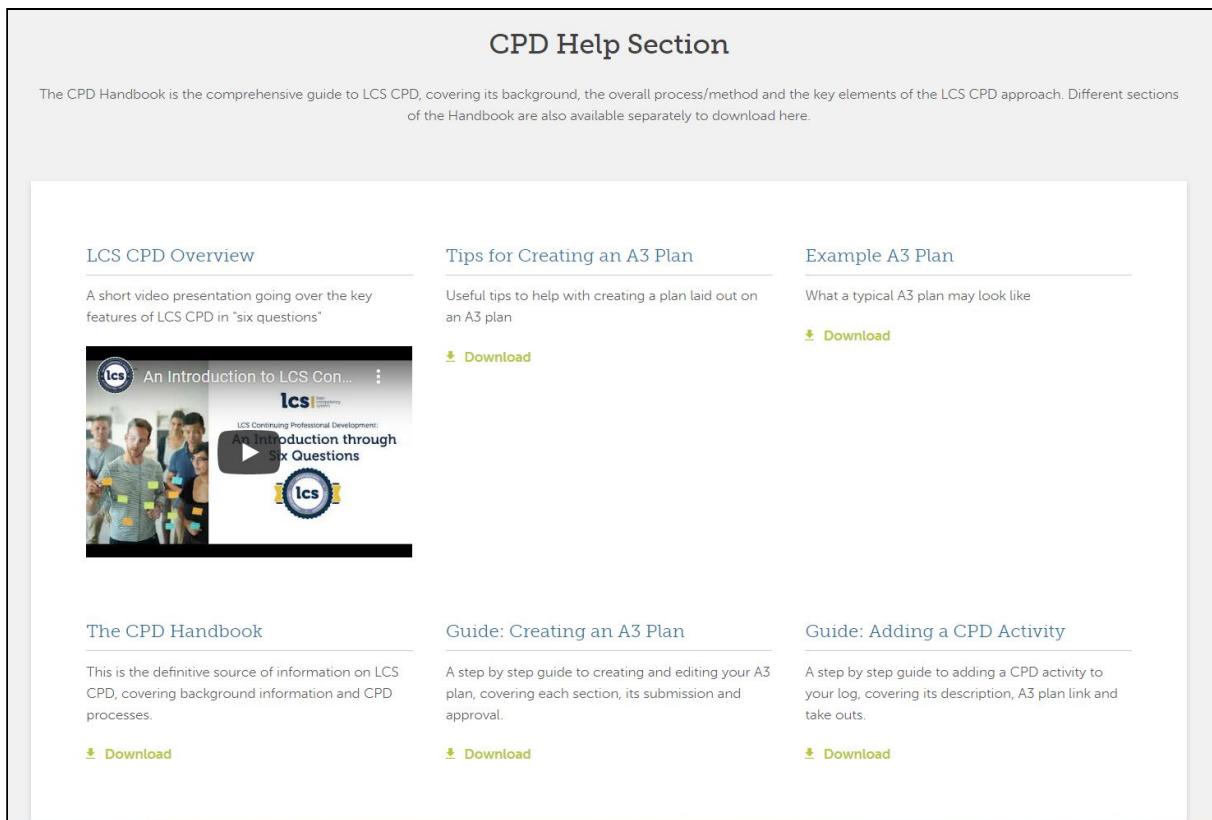
2.5 CPD Help & Support

2.5.1 CPD web pages help

There are pop up help boxes on several form pages, indicated by the  symbol. Click on this for help about the item to which it is connected.



The **Help** link in the drop down **Account** menu reveals a detailed help section, where you can download a PDF guide on several topics relating to CPD activity.



2.5.2 Other Support

LCS assessors may provide feedback on items submitted for approval or endorsement and can respond to email queries.

Your employer, or a consultancy with which you are associated, may be able to provide more formal or structured personal development support, particularly in the development of your A3 plan.

There are also support opportunities via LCS networks.

3. The A3 Plan

3.1 Purpose

The purpose of the A3 plan is to clearly indicate how you want to develop yourself professionally over your next development period (eg the next twelve months) and describes the practice, learning and communication activities you aim to undertake to achieve your development goals.

3.2 Structure & Format

The A3 plan is organised along PDCA principles in five sections and when finalised will resemble the example below. It can be printed as an A3 sized document and it can also be viewed on screen in a section by section format: **image to be replaced**

Current Plan ☰ ☑ 📄

Jean Smith's 2021 Development Plan

Plan	Act
<p>Background Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy</p> <ul style="list-style-type: none"> • Journey to date: Internal Lean Coach for over 3 years. Successes in production area • Seeking to develop or improve. Challenges in engaging admin and inbound logistics managers and teams • Vision statement: to be effective in engaging & coaching all functions and senior mgmt. in Lean <p>Strengths Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy</p> <p>Practicing:</p> <ul style="list-style-type: none"> • Introducing Lean. Coaching teams & managers in production to do daily kaizen • Knowledge and implementation of Lean tools in production situation • Developing visual management and coaching A3 Thinking <p>Learning:</p> <ul style="list-style-type: none"> • Reading leading edge articles on Lean Post/Planet Lean/LCS regularly <p>Communicating:</p> <ul style="list-style-type: none"> • Engaging and building relationships with production managers and operatives • Making effective presentations to production areas <p>Challenges Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy</p> <p>Practicing:</p> <ul style="list-style-type: none"> • Coaching managers in Hoshin/strategy deployment – because no experience in this • Engaging & coaching managers in admin & logistics to identifying wastes & developing measures because I don't understand the systems & processes • I don't have appropriate examples to use in teaching & coaching Lean in admin & logistics because of my lack of experience in those areas <p>Learning:</p> <ul style="list-style-type: none"> • How to implement, and coach strategy deployment because I haven't had any experience of doing so. We need to do this as a business this year • I don't have enough knowledge of how to apply takt time and daily measurement in non-production processes. <p>Communicating:</p> <ul style="list-style-type: none"> • Translating Lean so non-production areas can understand and learn (no previous experience of these areas) <p>Goals & Targets By the end of this CPD cycle I want to remain effective at what I do and improve by...</p> <ul style="list-style-type: none"> • Succeed in engaging the admin & logistics team to carry out regular kaizen events • Having learned how to do Hoshin and how our admin and logistics departments work... • Having communicated Lean effectively to non-production areas of the business 	<p>Activities Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy</p> <p>Practicing:</p> <ul style="list-style-type: none"> P1: Develop VI of Hoshin/Strategy Deployment course. By end Q1 P2: Work with admin & logistics managers to understand & map their systems & processes. By Q2 <p>Learning:</p> <ul style="list-style-type: none"> L1: Read books/articles on: How to do Hoshin/Strategy Deployment – both X-Matrix & A3. By end Q1 L2: Find and do a Hoshin course – or get 1:1 coaching. By end Q2 L3: Get exposure to and thus learning and inspiration from my peers in similar organisations on admin and logistics systems and processes. By end Q3 <p>Communicating:</p> <ul style="list-style-type: none"> C1: Develop teaching material that translates Lean into admin and logistics language with supporting examples from elsewhere. By end Q3

Owner: Jean Smith Updated: 21/10/2020 Plan Period: October 2020 - October 2021

The five sections are **Background, Strengths, Challenges, Goals** and **Countermeasures** and creating the plan involves moving through these five sections. You save each section before moving to the next.

The plan is designed to be A3 size if printed and there are limits on the number of words that can be used in fields and sections to ensure it does not become too large. The use of bullet points helps keep sentences succinct and it encourages the plan author to write with brevity and clarity.

Ideally, your plan should be constantly visible, so you regularly consider and contemplate it, for example, at your personal workstation or in your home office.

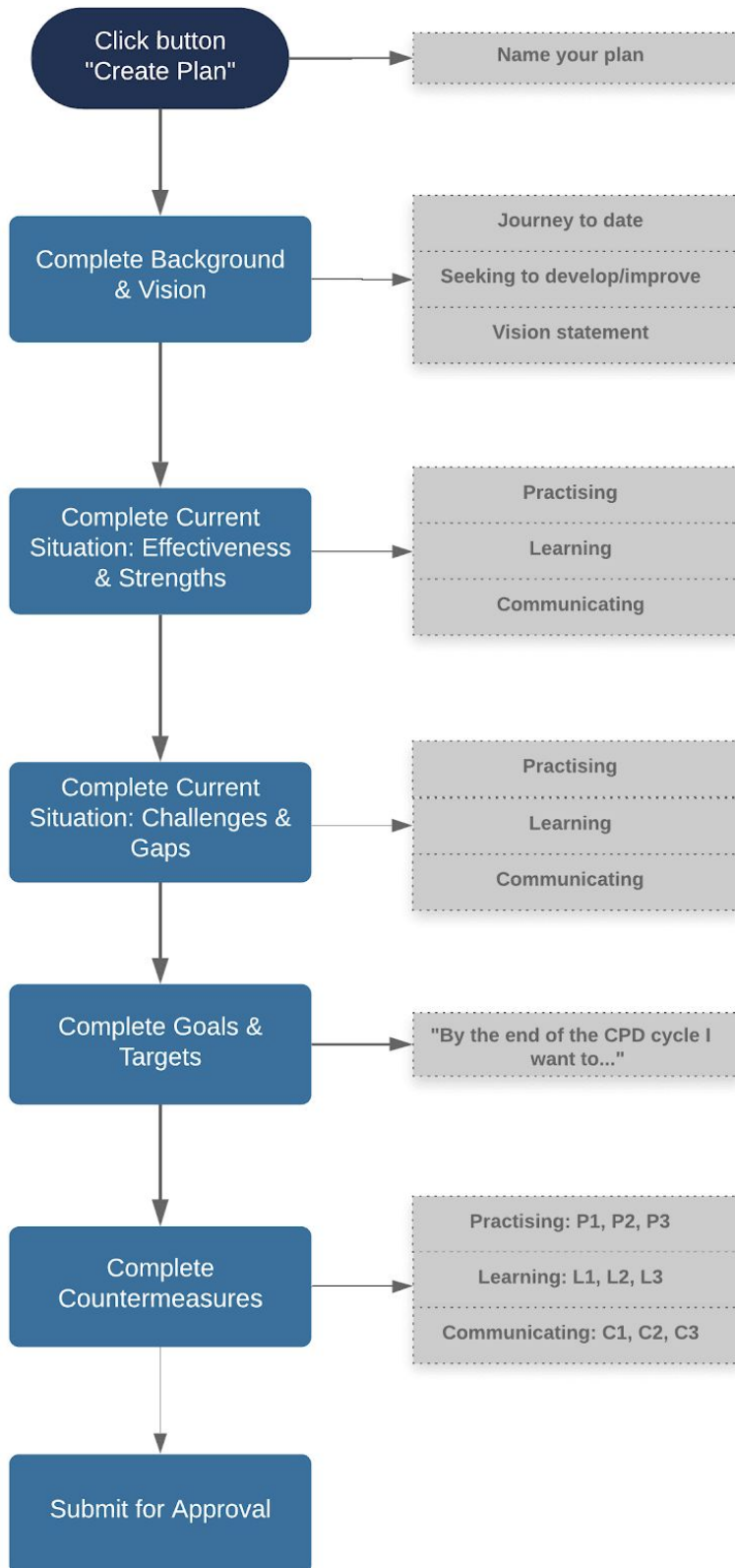
You can print it so it is physically displayed or make it your desktop background on your PC² This will help keep it salient and top of mind, which is a key factor in making it useful and impactful.

To view the plan as an A3 or to print it, click the ePDF icon in the top right corner of your current or previous plan view box.

²How to do this in Windows 10: i) Take a screenshot of your A3 plan. ii) Save it as an image; crop to remove unwanted edges. iii) On your desktop, right click and select Personalise. iv) In Background, select Picture, browse to find your saved screenshot, select it and click Choose Picture.

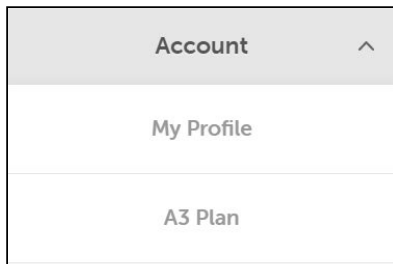
3.3. How to write an A3 plan

3.3.1 Process Summary



3.3.2 Create Your Plan

Once you have upgraded to PPM, an **A3 Plan** link is visible in your member account menu:



Click on A3 Plan and you are invited to create a new plan:

Create a new A3 Plan

Once you have chosen a title for your new CPD A3 Plan, you complete the five plan sections, starting with your Background & Vision. You then progress to Current Situation: Effectiveness & Strengths/Challenges & Gaps, Goals & Targets and finally Countermeasures.

When your plan is complete and you are satisfied with its contents, you submit it for approved by an LCS assessor. If it is not approved, an explanatory comment will be made. Once approved you start adding activities to your CPD Activity Log and periodically assess your progress.

Create Plan

Start by creating a title for your plan, for example, **Jean Smith's 2021 Development Plan**.

Note that you cannot change the title once set, so make sure it is clear, succinct and directional.

Click on **Create Plan** to start adding details, with the first section being **Background & Vision**.

3.3.3 Background & Vision

A3 Plan

Bill Bloggs Development Plan 2021

● — ● — ● — ● — ●

Background Strengths Challenges Goals Countermeasures

Background and Vision ?

145 characters

145 characters

145 characters

Cancel and Exit

Save and Next >

Provide brief information on your CPD status and a short vision statement.

- Line 1: summarise your Lean/CI journey to date. If you have undertaken CPD previously, then focus on the last 12 months. You can begin this with terms such as I have been... / I have had...
- Line 2: summarise what you are seeking to develop or improve. You can begin this with terms such as I want to... / I plan to...
- Line 3: write a brief vision statement that describes your aspiration for your professional development. It may be expressed in terms such as *to become...to achieve...to develop*.

The following resources may be helpful as a guide, but feel free to develop your own statement:

- “Your personal [vision statement](#) guides your life and provides the direction necessary to chart the course of your days and the choices you make about your career. Think of your personal vision statement as the light shining in the darkness that illuminates your life path”. [The balance.com](#)
- Sir Richard Branson: "To have fun in my journey through life and learn from my mistakes."
- Oprah Winfrey: “To be a teacher. And to be known for inspiring my students to be more than they thought they could be.”
- See [What to Include in a Personal Vision Statement](#) (with examples)
- See [How To Develop Your Personal Vision Statement](#) (PDF - Lindynorris.Com)

Once you have completed this section, click on **Save and Next** to proceed to the **Current Situation** section.

3.3.4 Current Situation

Current Situation has two parts - 1) Effectiveness & Strengths and 2) Gaps & Opportunities inc. Causes

A3 Plan
Bill Bloggs Development Plan 2021

● ——— ● ——— ● ——— ● ——— ●
Background Strengths Challenges Goals Countermeasures

Current Situation: Effectiveness & Strengths ?

Practicing

145 characters

145 characters

145 characters

Learning

145 characters

145 characters

145 characters

Communicating

145 characters

145 characters

145 characters

Cancel and Exit
< Previous
Save and Next >

Effectiveness & Strengths

Describe your current strengths and what you are effective at for each of the three areas, writing a maximum of three lines for each:

- **Practicing:** how you apply knowledge learned, and how you engage in activities for the purpose of improving or mastering them while carrying out your Lean/CI activity/role.
- **Learning:** acquiring knowledge or skills through study, experience, or being taught in both core Lean and new areas.
- **Communicating:** exchanging knowledge – e.g. information, skills, or expertise - among colleagues, networks, communities or organisations. It can include:
 - **Teaching** i.e. educating, imparting knowledge as well as inspiring, motivating and forming relationships.
 - **Sharing** (not informal) i.e. giving others the benefit of what you have learned from your reflection, education and practice.

Once you have completed this section, click on **Save and Next** to move to the second part of Current Situation, **Areas for Improvement - Gaps & Opportunities inc. Causes**

Areas for Improvement - Gaps & Opportunities inc. Causes

A3 Plan

Bill Bloggs Development Plan 2021

● ——— ● ——— ● ——— ● ——— ●

Background Strengths **Challenges** Goals Countermeasures

Current Situation: Gaps & Opportunities inc. Causes i

Practicing

144 characters

144 characters

144 characters

Learning

144 characters

144 characters

144 characters

Communicating

144 characters

144 characters

144 characters

Cancel and Exit
< Previous
Save and Next >

Write up to three statements for some or all three areas that highlight your challenges and gaps - noting causes.

Gaps relate to personal capability, competency and deficiencies.

- **Practicing:** where there are gaps in your effectiveness at practicing Lean
- **Learning:** where there are gaps in your Lean knowledge
- **Communicating:** where there are gaps in your communication approach or capability

You can briefly describe the causes of your current gaps or the issues relating to them and note that you do not need to have identified gaps in each of the three areas and just like in any A3, the current situation shouldn't include countermeasures – just the facts or evidence.

Once you have completed this section, click on **Save and Next** to move to **Goals & Targets**.

3.3.4 Goals & Targets

A3 Plan

Bill Bloggs Development Plan 2021

● Background ● Strengths ● Challenges ● **Goals** ● Countermeasures

Goals & Targets i

By the end of this CPD cycle I want to remain effective at what I do and improve by...

145 characters

145 characters

145 characters

Cancel and Exit
< Previous
Save and Next >

In this section you list what you want to achieve, in up to three short statements (each a maximum of 145 characters).

These should clearly relate to the 'gaps and opportunities' that you have previously identified.

You should complete the statement: "by the end of this CPD cycle I want to remain effective at what I do and improve by":

- Having practiced/carried out...xxxx... i.e. what you want to be able to practice
- Having learned...xxxx...i.e. what you want to have learned
- Having communicated...xxxx...i.e. what you want to have taught, shared, written etc.

Once you have completed this section, click on **Save and Next** to move to **Countermeasures**

3.3.5 Countermeasures

A3 Plan
Bill Bloggs Development Plan 2021

● ——— ● ——— ● ——— ● ——— ●

Background Strengths Challenges Goals Countermeasures

Activities for Improvement: Countermeasures i

Practicing

P1 145 characters

P2 145 characters

P3 145 characters

Learning

L1 145 characters

L2 145 characters

L3 145 characters

Communicating

C1 145 characters

C2 145 characters

C3 145 characters

Cancel and Exit
< Previous
Save A3 Plan

In this section of the plan you state the high level countermeasures (or ‘experiments’) that you will undertake to maintain your current levels of competence and those you propose to undertake to close your current gaps and achieve your targets.

Countermeasures are grouped into the three areas – practicing, learning and communicating.

Each activity for improvement is given a letter/number reference: the letter is either **P** (for practice), **L** (for learning) or **C** (for communicating). Note that you will link to these improvement activities in your Activity Log and in your Progress Check Record, where you assess your CPD progress.

You are allowed up to **three entries** for each area.

Make sure that the countermeasures are appropriate to meeting your stated goals and addressing the causes of the gaps you have described or the opportunities that you have noted.

You should add a date to each line indicating when you aim to complete it – e.g. “...by end Q3” or “...by end September 2021”.

A useful sense check is to read your A3 backwards, and for each activity for improvement check if this statement holds true:

“I plan to do this countermeasure in order to help me meet this target by addressing these gaps which in turn will take me towards my vision”.

If this makes sense, then you can be confident that you have chosen the right countermeasures to address the gap/opportunity identified.

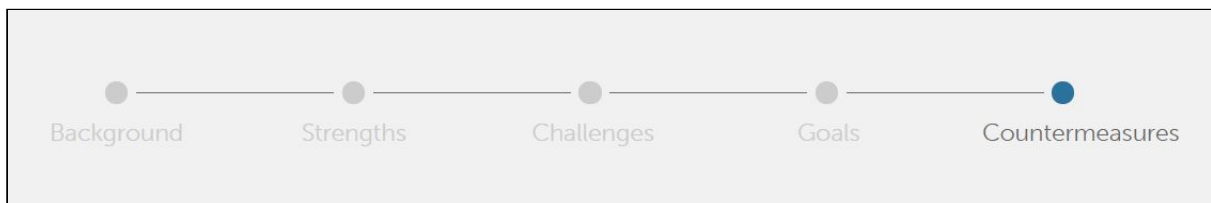
Once you have completed this section, click **Save A3 Plan**.

Your plan will be displayed in its entirety (A3) and you can now either edit it by clicking **Edit Plan** or request endorsement by clicking the **Request Approval** button.



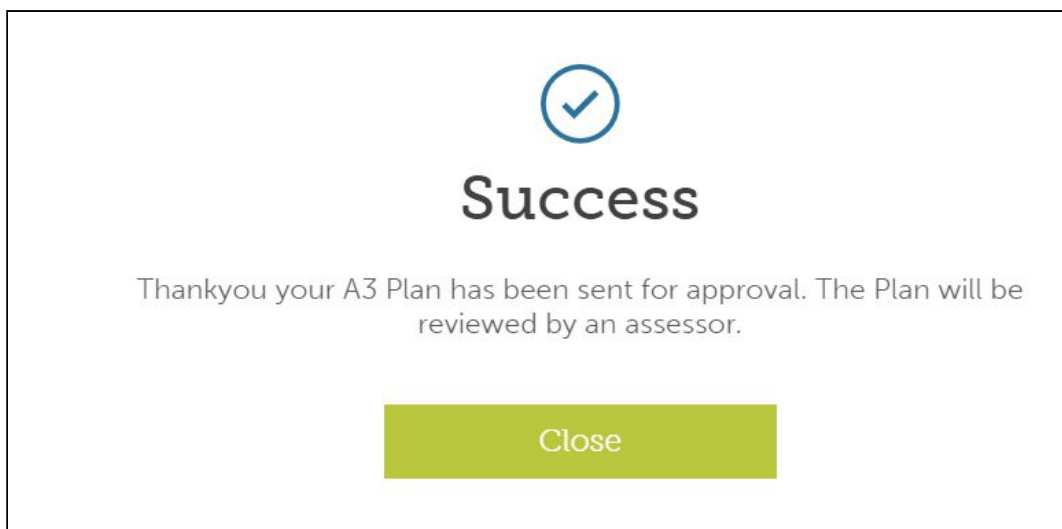
3.4 Submitting the Plan for Approval

You can edit a section before you submit the plan by clicking the **Edit Plan** button and then clicking on any of the five section titles on the top bar:



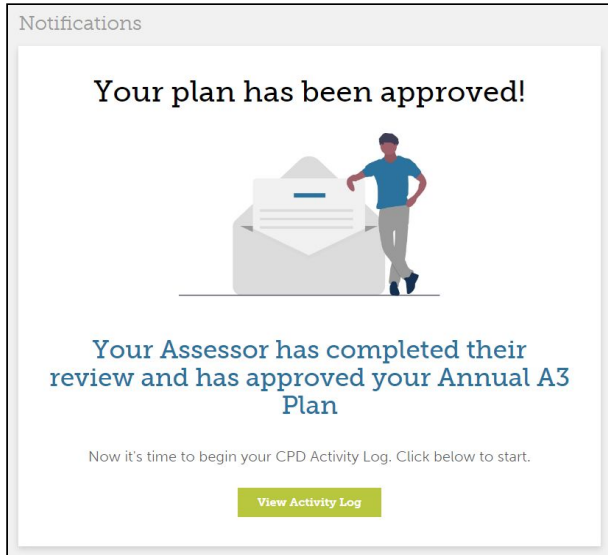
Once you have updated and saved each section, click the **Request Approval** button.

You receive confirmation that your request has been sent.



3.5 Approving the A3 Plan

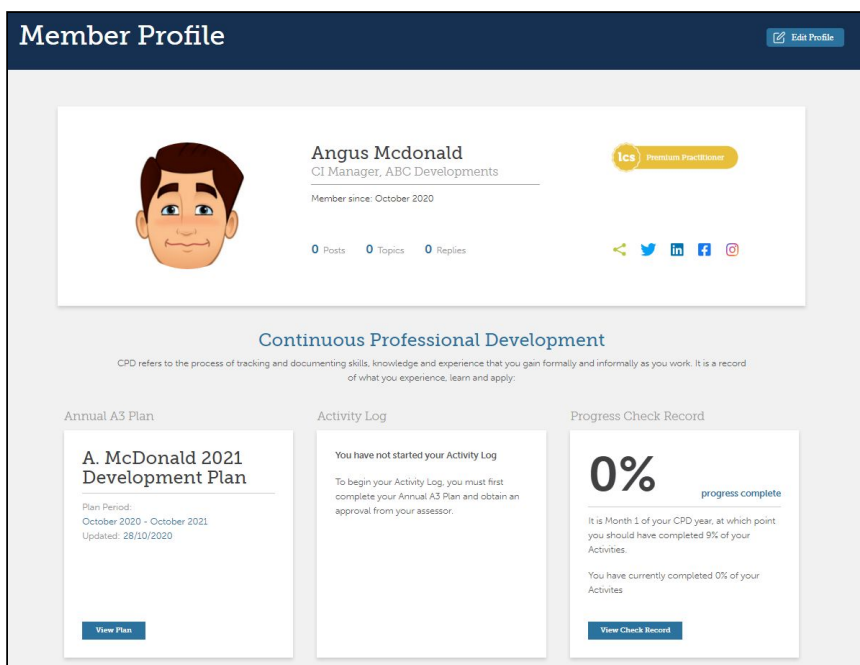
An LCS assessor reviews your plan. If approved, under **Notifications** in your member profile you see the following:



If it is not approved, the assessor makes a comment outlining the reasons which appear beneath your plan, after which changes can be made.

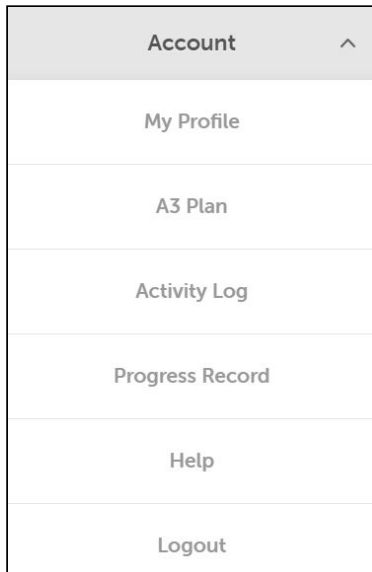


Once your plan is approved, new CPD elements appear in your member profile dashboard:



As well as A3 plan information, there is information about your activity log and your progress check record. Your last logged activity shows in the middle box.

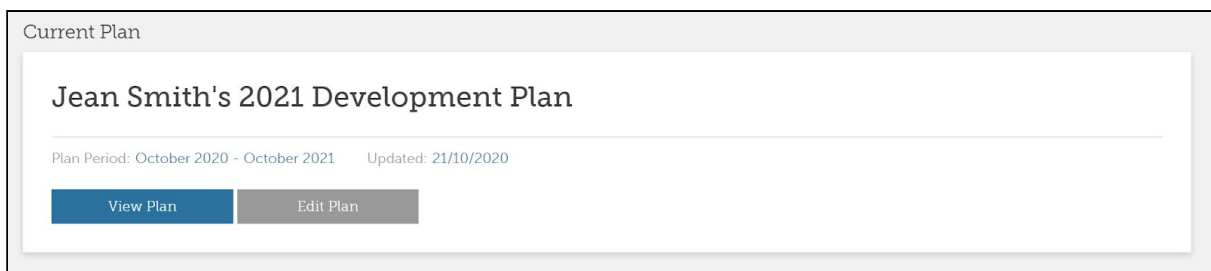
Additional items appear in your account drop down menu, enabling you to proceed to the next stage in the CPD process - logging activities.



3.6. Editing Your A3 Plan

3.6.1 Editing plan sections

You can edit your current A3 plan should circumstances dictate by clicking the **Edit Plan** button, as illustrated below:



You can then change specific sections, for example, by clicking **Edit** in the Background & Vision section below:

3.6.2 Changing key activities/countermeasures

It is possible that your circumstances change during your CPD cycle which necessitate deleting one or more key activities/countermeasures and creating new ones. For example, you may change your role or decide on a new personal development direction. Ideally,

these should not be changed during the CPD cycle.

If you delete any of the Learning, Practicing or Communication activities/goals (eg P1, P2, L1, C3, etc) in a current A3 plan that has been approved and you have already logged activities against any of these, **then these linked activities will also be deleted.**

A warning box appears after you click the delete button.

In the example above, the PPM is deleting the Learning 2 (L2) activity/goal and the message warns you that the activities linked to L2 will also be deleted if the PPM proceeds.

You can then either click **Cancel** in the box to cancel the change made to L2 and therefore retain the activities associated with L2, or can click **I understand**, in which case all activities tagged with L2 will be deleted along with its associated Progress record.

3.7 Request Endorsing & Archiving your A3 Plan

3.7.1 Endorsement timing

While the LCS CPD allows up to 12 months to complete a CPD cycle, it is possible that all the goals in a plan are achieved in a shorter time frame.

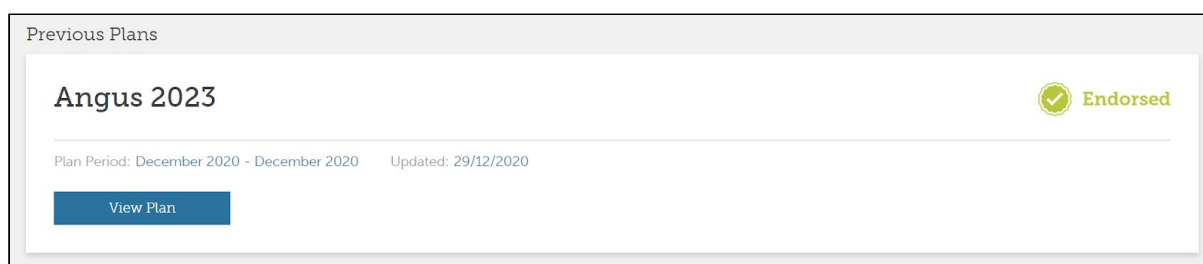
Therefore, at any point you can request that your A3 plan is **endorsed and archived**. This is achieved by clicking the **Request Endorsement** button at the foot of your current plan display.



3.7.2 Assessor Endorsement

If the assessor approves your request, the plan is closed and archived. It is marked as **Endorsed**, listed under **Previous Plans** in your dashboard. It can be viewed by clicking the **View Plan** button.

Note that the assessor will not sanction the endorsement of a plan unless there is clear evidence that the CPD cycle has been completed satisfactorily.



Once the plan is archived, a **Create new A3 Plan** box appears so you can immediately start another plan and CPD cycle.

When creating a new a new version you may want to consider these questions:

- What are you now aware of that you need to do in the next cycle?
- How might you better structure and manage your CPD plan for the next cycle?

3.8 Post Plan Completion – Check & Reflect and Act

3.8.1 Purpose

- To reflect on the CPD cycle you have just completed
- To prepare for the next CPD cycle

3.8.2 Process

- Reflect on the whole cycle and the extent to which you have achieved your goals
- Reflect on how you developed and executed your this CPD A3 Plan and what you are now aware that you need to do in the next cycle
- Determine how you might Act to better structure and manage your CPD plan for the next cycle:
 - Incorporating your learning into the process
 - Standardising the methods that have worked in this cycle

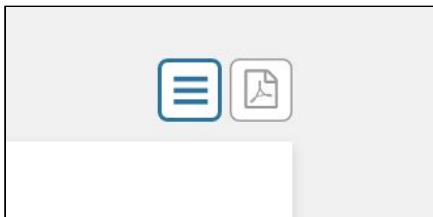
3.8.3 Reflecting & Acting

- In preparation for your next CPD cycle, you should:

- **Check and Reflect:** Briefly summarise your overall progress for Practice, Learning, Communicating, noting :
 - The extent to which you have reached your targets
 - The gaps remaining or new gaps identified
- **Act /Adjust:** Address the questions:
 - What are you now aware of that you need to in the next cycle?
 - How might you better structure and manage your CPD plan for the next cycle?

3.9 Displaying & Printing Your Plan in A3 Size

You can print your plan as an A3 document by clicking the PDF icon in the top right corner of your current plan display.



4. Activity Log for Countermeasures

4.1 Purpose

The **Activity Log** captures all the activities you undertake that contribute to the achievement of your personal development goals.

It provides a list of learning, practicing and communication activities you undertake as part of your normal working life.

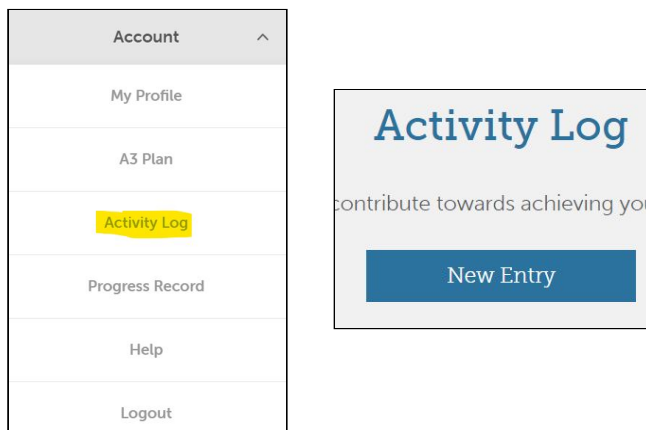
4.2 Access & Timing

The **Activity Log** is accessed from your account menu.

TIP: You should aim to record an activity as soon as possible after it has taken place, clearly describing it and its impact. If you delay making an entry, you risk forgetting its details.

4.3 How to Add an Activity

When you want to record a CPD activity, click **Activity Log** in your account drop down menu, then click **New Entry**:



A blank **New Activity Entry** will appear:

Current Plan

New Activity Entry (i)

Description of Activity (Do)

 180 characters

Start Date
End Date

Learnings (Reflect)

 180 characters

A3 Plan Countermeasure

Future Actions (Act)

 180 characters

Attachment + Choose File

[Add Activity](#)

Complete the entry as follows, noting the word limit for each area. You should add text to every field, even if it is, for example, 'no learnings' or 'no future actions':

4.3.1 Description of Activity

- The precise nature of the activity undertaken, e.g. the name of the training course taken, title and context of a presentation made, title of a book read, CI activity performed, project implemented, etc. If appropriate, state the length of time spent undertaking the activity.

4.3.2 Start and End Date

- Add in the start and end date of the activity

4.3.3 Link to A3 Plan

- Since all activities should link to the countermeasures in your A3 plan, click the drop down box in A3 Plan Activity and select one line.
- For ease of referencing in the A3, each improvement activity has been assigned a letter: **P=Practice**, **L=Learning** and **C=Communication**.
 - For example, if you identified three targets for improving your practical competence in your A3 plan, they would be prefaced by P1, P2 and P3.

4.3.4 Learnings

- In the Learnings (Reflect) box note your 'take outs' - the critical reflections, learnings, observations, insights, that may have arisen from the activity.
- For example, these could include new technical skills gained, a personal strength or weakness identified, a knowledge or skill gap identified, a more effective communication approach found, a broader understanding of a business issue, an improvement in a particular methodology used, etc.

- What key things did you learn? How has it helped to close the gap that you identified in your A3 Plan?

4.3.5 Future Actions (Act)

- List actions – if any – you intend to take as a result of the activity you have undertaken.
- What will you do differently in future?
- For example, a change in your interpersonal behaviour, acquire a new skill, update your understanding of an issue or business trend, etc.


4.3.6 Attachment

- **OPTIONAL:** upload one document/file that relates to the activity and provides greater context - for example, a record of achievement, an A3 project plan, a project report, a presentation, an award, a photograph or video, etc
- **Note:** not all activities will need a supporting document/file.

4.4. Submit the Activity

Click the **Add Activity** button and your entry is displayed with its unique number and stored in your Log. If necessary, you can edit the activity (click **Edit Entry**)

Current Activity Log			
Activity	Description of Activity (Do)	Learnings (Reflect)	Future Actions (Act)
#1	Attended a course on policy deployment	Appreciated the underlying philosophy and how it can help foster engagement. Realised the importance of have a strategic linkage to improvement activities	Develop a plan to get the whole team to understand what policy deployment is and the benefits it can bring
	Date: 06/09/2020 - 13/09/2020	A3 Plan Activity: L1: Learning	


[Edit Entry](#)

You can add another entry by clicking the **New Entry** blue box.





- for example, you may have another insight to add or a new follow up action to consider:

Activity Log

List learning, practice and communication activities that contribute towards achieving you development goals. Click on New Entry to add an activity.

[New Entry](#)

Current Activity Log

Activity	Description of Activity (Do)	Learnings (Reflect)	Future Actions (Act)
#5	<p>Watched the Appreciative Inquiry online video series</p> <p>Date: 02/08/2020 - 28/08/2020</p>	<p>Picked up a much deeper understanding of how to use in in improvement activities.</p> <p>A3 Plan Activity: L2: Learning</p>	<p>Brief the team on its use</p> <p style="text-align: right;"> Edit Entry</p>
#4	<p>Attended the Foundations of Appreciative Inquiry course</p> <p>Date: 14/06/2020 - 17/06/2020</p>	<p>The strengths based approach makes a lot of sense and is inherently more positive than Leans' deficit based approach</p> <p>A3 Plan Activity: L2: Learning</p>	<p>Add some AI tools to the group's CI toolbox - use in the Claims office, where there is a lot of negativity</p> <p style="text-align: right;"> Edit Entry</p>
#3	<p>Read the book The Principles of NLP</p> <p>Date: 02/02/2020 - 25/02/2020</p>	<p>I can see how it uses perceptual, behavioural, and communication techniques to make it easier for people to change their thoughts and actions. But is solid science behind it?</p> <p>A3 Plan Activity: L1: Learning</p>	<p>Consider using it as a method of personal development through promoting skills, such as self-reflection, confidence, and communication</p> <p style="text-align: right;"> Edit Entry</p>
#2	<p>Co-delivered a policy deployment exercise in the northern region</p> <p>Date: 06/04/2020 - 08/04/2020</p>	<p>Important to have a through pre-session briefing of those involved. Check they understand the theory</p> <p>A3 Plan Activity: P1: Practicing</p>	<p>Write the policy deployment handbook</p> <p style="text-align: right;"> Edit Entry</p>

4.5 Reminder message

The LCS CPD system sends you a reminder message if you have not added any activities for **28 days** after your A3 plan was approved.

You also receive a reminder message one month before your PPM expires.

5. Progress Record: Check & Reflect

5.1 Purpose

The **Progress Record** is where you check and reflect on your professional development progress based on the actions you have undertaken relating to the countermeasures detailed in your A3 Plan.

You can carry out up to three progress checks during your CPD cycle. It is recommended that based on a 12 month CPD cycle, checking and reflecting should take place approximately four months, including the CPD cycle year end. The first two are a 'light touch' check on progress, while the final review should be more thorough.

5.2 Progress Checking Process

5.2.1 Access the Progress Record Box

When you are ready to undertake the first self assessment of your progress, click **Progress Record** in your membership account drop down menu.

A progress check record box will appear. This lists each improvement countermeasure reference you specified in your A3 plan, the number of activities you have undertaken so far that relate to it, a completion percentage and a field for notes relating to it.

It also shows an overall completion bar (empty in the example below) and three boxes indicating the checkpoint you are at - for example, in the table below it shows the first checkpoint with the other two Checkpoint boxes greyed out.

CPD Progress Check Record

It is month 1 of your CPD cycle (assumed to be 12 months), at which point you should have completed 9% of your activities. You have currently completed 0% of your activities. Click the Edit Record button at the foot of the forms and when you have finished the click Submit for Endorsement button.

Practicing - 0% Complete


Record	Activity #	Completion	Additional Notes
Practicing 1	1	0%	
Practicing 2		0%	
Practicing 3		0%	

5.2.2 Add a Completion Percentage

Click **Edit Record** and the table will open in edit mode. The Edit button is at the bottom of the third form (Communicating)

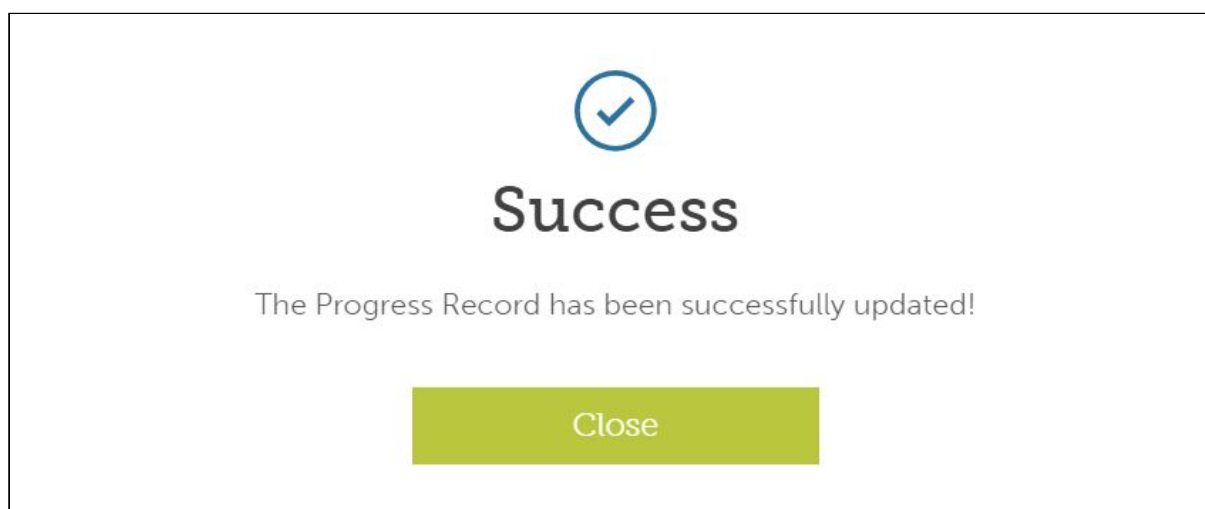
Note that Activities you have undertaken relating to the record will now be displayed. These provide corroboration of your assessment, since they show what you have done to enable the progress to take place. In general, the more activities, the stronger the evidence.

You add a completion percentage for each entry, selecting a number that represents how much progress you think you have made, based on the activities you have undertaken; you can keep it simple by using units of ten or five.

Practicing 2	Become well practised in designing and implementing 5S programmes	
Completion (%)	Notes	
75 - +	Need to finalise the post implementation review document	244 characters
Activity	#2 Successfully implemented 5S project in a key unit in the department	

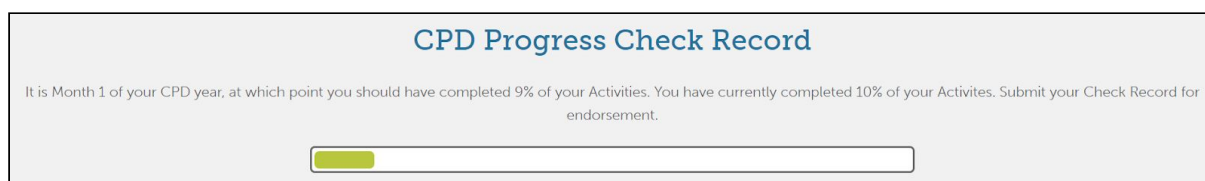
If necessary, you can add a brief note for each line, for example to provide context, add a caveat or salient details.

When you have completed your assessments, click **Save** and a pop up screen will appear indicating your Progress Record has been updated:



5.2.3 Progress Record Update

Each time you update your progress, your overall completion bar will be updated, for example:



Also, the % completions for Practicing, Learning and Communicating will be updated:

Practicing - 59% Complete		
Record	Activity #	Completion

Learning - 65% Complete		
Record	Activity #	Completion

Communicating - 34% Complete		
Record	Activity #	Completion

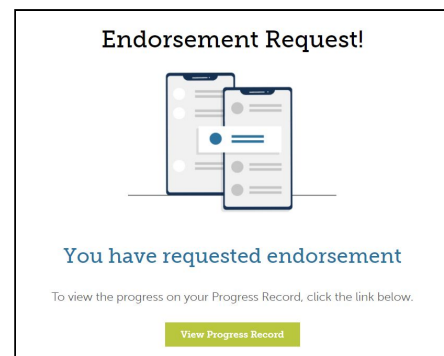
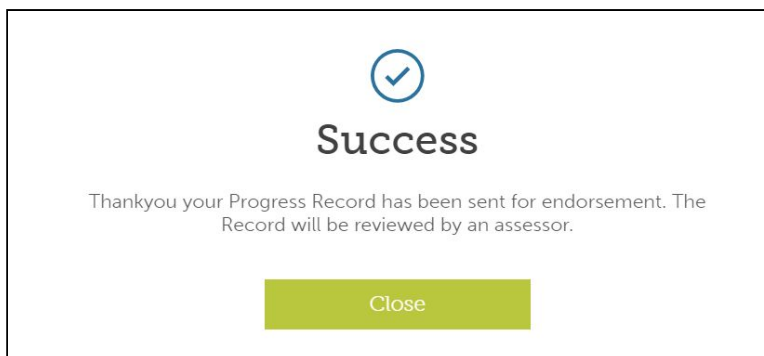
5.2.4 Submit your progress check for endorsement

Once you are satisfied with your assessment of progress, you can submit it for endorsement by an LCS assessor. Note that you can request up to three endorsements for each CPD cycle.

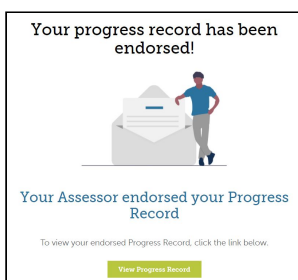
Click the **Submit for Endorsement** button at the foot of your CPD Progress Check Record:



A pop up message appears confirming your submission and an Endorsement message



appears in your Profile notifications:




When the LCS assessor has endorsed your Progress Check, you receive a notification in your profile Dashboard.

Your overall progress to date is reflected in your completion bar, as shown in the example below:

CPD Progress Check Record

It is Month 2 of your CPD year, at which point you should have completed 17% of your Activities. You have currently completed 53% of your Activities. Submit your Check Record for endorsement.



Practicing - 59% Complete

4 month checkpoint (17%)8 month checkpoint (53%)12 month checkpoint

After your first endorsement, the next month checkpoint box is now revealed, indicating your next progress check and the final month box is greyed out.

6. Terms

1. Premium Practitioner Members (PPM) registered for CPD are free to promote their CPD status and use the LCS CPD visual identity on printed or digital media.
2. By registering for PPM, members consent to the LCS storing the data they provide. The LCS will not use this data for any other purpose other than for CPD and will not give or sell it to a third party. PPM's will receive occasional LCS newsletters and similar messages by email and can choose to opt out of such communication if they so wish. See the [LCS Privacy Policy & Data Protection](#).
3. PPM's are solely responsible for managing their CPD cycle in terms of developing their A3 plan, maintaining their activity record and undertaking periodic progress checks.
4. If a PPM wants to continue CPD activity at the end of an annual membership cycle, he or she must renew PPM.
5. LCS assessors are under no obligation to provide personal or work related advice to PPM's during the CPD cycle.
6. The LCS can withdraw PPM status from an individual should he or she breach the LCS website [rules of behaviour](#).
7. CPD status will be withdrawn if the PPM fee is not paid within one month of its due date.
8. No refunds of fees paid will be made should a PPM choose to withdraw from LCS CPD or if his or her CPD status is withdrawn by the LCS.
9. The PPM and associated CPD service is provided by Lean Competency Services Ltd., a company registered in England and Wales, which holds the Cardiff University licence to operate the Lean Competency System.
10. CPD Terms may be changed without prior notice, though the PPM will be informed when these take place and of their implications.