

# ACCREDITATION

## CASE STUDY



### Introduction

The BGL Group is a privately owned UK company, founded in 1992, as an insurance underwriter. After a period of strategic change in 1997 to become a broker, it has become one of the largest consumer insurance groups in the UK. As a multi-million pound business, it has more than eight million customers and over 3,100 members of staff. This expansion has been achieved through a mixture of organic growth, start-up businesses and a series of major strategic acquisitions. BGL's Insurance and Legal Services (ILS) pillar has a central Commercial Delivery and Technology (CD&T) function servicing the individual business units within the pillar

which includes brands such as Budget Insurance, Dial Direct, and Junction's affinity partnership brands such as O2, Marks & Spencer, Lloyds Banking Group, Co-op, Post Office and RAC. The ILS project management community is responsible for the prioritisation, scheduling, project analysis, project/programme management and change delivery for these ILS business change teams.

BGL is committed to having highly skilled, trained people using industry-leading practices to ensure the business delivers for its customers. This strategic commitment is demonstrated through comprehensive processes that are consistent at every level of the ILS pillar.

## A culture of learning

When a project manager joins the team they embark on a two month induction programme which is conducted through a mixture of face to face meetings, shadowing and self-learning activity. This detailed programme provides project managers with the context of the business they are working in and gives them easy access and explanation of all the tools and templates required to carry out their role effectively.

Great value is placed on attaining recognised project management qualifications. New employees are expected to hold or obtain APM qualifications and it is an essential requirement to be working towards further APM qualifications. The BGL Group currently fully fund qualifications from Introductory Certificate: The APM Project Fundamentals Qualification, to Practitioner Qualification and project managers are given time to study and prepare for their APM courses.

"We pride ourselves on ensuring we have the best possible opportunities for our people to grow and develop, to complement this we have strived to achieve APM accreditation; a real positive achievement, one of which very few companies in our industry have managed to accomplish. It demonstrates our commitment to providing great project management capability.

We have worked hard to ensure best practice is in place and that our team members are developed to the highest standards in this discipline. It will also place us well externally, demonstrating to our partners, and in particular potential new partners, our strength in this area."

**Paul Loucas**, associate director, CD&T



There is wide recognition of the importance of personal and professional progression and this is combined with a strong appetite to attain professional qualifications. Within the project management team most employees have achieved the APM Practitioner Qualification and are full APM members with further applications in process. Joanne Atkinson, programme manager, states: "For a lot of people, project management is seen as a job, not a profession. Although we demonstrate our work to our stakeholders and peers every day, having a professional qualification, that members of our department could see we had to work hard to obtain, reinforces this commitment to our role and the complexities within it. It gives the project managers a clear learning path through to the higher levels of APM qualifications, which they can see aligning to their career aspirations. For the company, it means we stand out from our competitors, demonstrating to potential affinity partners not only a commitment to our people, but also to the quality of change delivery they can expect from us."

Kieran Watson, programme manager, reinforced how important the knowledge and skills gained through APM qualifications are and added "the focus on soft skills is as invaluable as the technical competencies, it shows the breadth of skills required of a project manager".

In 2013, a project management competence framework was introduced aimed at providing career progression guidance for the technical, contextual and behavioural skills required for three levels of career roles; project manager, programme manager and senior programme manager. The *APM Competence Framework* now forms the basis of this with individuals needing to demonstrate skills consistently at each level, as defined by APM, to be able to progress. The framework also links into APM qualifications and states which qualification is relevant for each level.

Work has recently begun on creating a programme management office competence framework which will formalise progression paths and requirements for these key roles. The APM framework is a vital part of this advancement.

The *APM Body of Knowledge* is intrinsically linked to the ILS CD&T professional development material. It is referenced in documents such as job descriptions, appraisal forms and online policy documents enhancing the team's project delivery capabilities.

Team members have access to a central project management area on the group's intranet which facilitates easy access to the *APM Body of Knowledge*, a core reference point for the project management team. The intranet site also provides access to a multitude of e-books and other publications, project microsites, documented governance processes and templates, and opportunities for continuing professional development. Direct links to the APM website and specific interest groups are also available. The extensive online material is accessible from any mobile device enabling staff outside of head office to benefit.

## Committed to continual development

The BGL Group is a firm advocate of continual development and works to empower staff to challenge the status quo and identify and implement innovative business solutions. All ILS project management staff maintain a detailed log of continuing professional development which is reviewed informally on a monthly basis and formally every six months. The staff professional development record sets objectives and CPD activities are identified to fulfil those objectives. The participation and evaluation of learning activities is essential for all staff and sharing learning outcomes is a valued part of the team ethos. Project management community meetings take place on a weekly basis where project managers can not only share lessons learnt but seek assistance from colleagues on current challenges and explore continual improvement opportunities.

Staff have consistent and easy access to APM's *Project* journal and are encouraged to attend APM events and specific interest group meetings. Over the past year staff have benefited from attending APM events on topics ranging from agile project management to project management office competences and career paths.

Joanne Atkinson explains: "The choice of events is wide and varied, which means there is something each of us can tailor to our own development needs or interests. Bringing back my observations to my own peers has provided an opportunity to debate and agree enhancements to our own methods or processes."

Regular networking events and workshops add further valuable opportunities for individuals' continuing development alongside the more formal learning. Joanne

continues: "I have found the opportunity to network with project managers from other organisations to be as valuable as the content of the event itself – obtaining context and understanding a little of their pressures and structures broadens my own understanding of how similar principles can be applied in many different organisations."

The BGL Group is currently exploring hosting an APM event and has been researching possible subjects to present to the wider project management community, forging even stronger links with APM.

## What APM accreditation means to us

"Gaining APM corporate accreditation is a validation of which we are all very proud. It's an important independent evaluation of our practices and showcases the team's competence in project management. We thought our project practices, investment in our team's knowledge and continual development were good already and since joining APM as a corporate member we have invested further in our staff through funding for professional qualifications and individual membership to APM," explains Beverly Laud, senior commercial delivery manager.

"While I personally believed our investment in our project management community was to a high standard, it was extremely satisfying to get an independent assessment that this is the case. This award not only allows us to optimise staff retention and attract new project managers through the variety of professional development and continuous learning opportunities we offer, it also promotes our project management capabilities to our internal customers and existing and new external partners."



**Beverly Laud,**  
senior commercial  
delivery manager

## Client testimonial

Junction, BGL Group's insurance partnerships business, was formed in 2002 and has grown rapidly to its current position, providing insurance for over 2.2 million customers through some of the UK's best known brands. It has enjoyed a record breaking start to its financial year with year-on-year sales increases of over 25 per cent.

"As one of the UK's leading insurance affinity providers, Junction has to provide the best possible level of service and delivery to its partners and stakeholders. "We work with prestigious brands including O2, Marks & Spencer, Lloyds Banking Group, Co-op, Post Office and RAC to create and deliver tailored insurance propositions and brand appropriate levels of service.

"For the brand customer there has to be an invisible transition from the brand to Junction and back again. We are, essentially, custodians of our partners' brands and have a responsibility to deliver the brand standard to customers in the same way that we would for any of our own BGL brands.

"Our project management team is vital throughout this process as they help to drive delivery of the solutions by providing the framework and structure required to optimise delivery.

"In the digital world we expect changes to happen quickly and the same is true in the insurance sector. If we see a problem or a blockage that is impacting the end user, say in the customer journey buying a policy, then we need to instigate change immediately; agility in the way we work and manage our projects is therefore essential.

"Having APM accreditation means that an independent assessment has confirmed that we are investing in our project management competency and knowledge. Professional qualifications and membership, along with continual learning opportunities, not only provide our project managers with the skills that they require in order for us to drive value for our partners, but also provide those partners with a high level of confidence in our capability. Having a team that is endorsed by an internationally-recognised accreditation scheme will also be extremely helpful when talking to potential partners about the benefits of working with Junction and BGL Group."

**Ali Crossley**, customer director,  
Junction, part of the BGL Group



## Personal story

Iris Davies, project manager, joined BGL in 2006 and began studying in April 2015 for the APM Practitioner Qualification. She has worked on a variety of projects including implementing web chats for numerous brands, managing compliance projects and the communications stream of the integration of other business units. Iris is currently involved in setting up a new insurer partner, building motor and home schemes, and setting up a mobile self-service centre for new partners.

"There's a growing recognition of the value that competent and capable project professionals can offer, and accreditations are becoming increasingly important. APM is recognised globally by leading organisations and gives us the knowledge and skills required to be able to deliver projects successfully. "The beauty of the course was that it was delivered in a variety of ways such as classroom learning, online and podcasts. You could learn in a way that suits you, whenever and wherever you like.

"Completing the course gave me a common framework and terminology to use with my colleagues and a much better overview of the project process, particularly in more technical areas like estimating and contracts.

"It is always useful to have a set of tools that give you a structure and framework to the way you work, even if that is just backing up your prior knowledge and experience.

"Through this accreditation, we can provide confidence to our stakeholders, both internally and externally, that we are dedicated to developing our project professionals.

"The accreditation is great for BGL too as it will not only allow us to attract and retain the best project management talent, but will increase our competitive advantage, as we can provide improved project delivery through a highly skilled and qualified project management community."

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### **FIVE**Dimensions of Professionalism

#### **APM Corporate Accreditation**

APM Corporate Accreditation will help you stand out as an exemplar in the development of project management professionals. It provides assurances to your customers and suppliers and allows you to attract and retain the best project management talent in the country.

APM Corporate Accreditation recognises the commitment of organisations and professional development services to the defined APM FIVE Dimensions of Professionalism, each of which is supported by an APM standard:

#### **Breadth**

The *APM Body of Knowledge* defines the knowledge needed to manage any kind of project. It underpins many project management standards and methods including the National Occupational Standard in Project Management.

#### **Depth**

The *APM Competence Framework* provides a guide to project management competences. It is part of your professional toolkit; mapping levels of knowledge and experience to help you progress your skills and abilities.

#### **Achievement**

APM qualifications take your career in new and exciting directions. They are recognised across the profession and aligned with IPMA's 4 level Certification Program.

#### **Commitment**

Continuing Professional Development helps develop your project management practice. A targeted development plan will enhance your project management career.

#### **Accountability**

The APM Code of Professional Conduct outlines the ethical practice expected of a professional. Becoming an APM member shows your commitment to the Code and sets you apart from others.