

PBI SQA Accredited Courses Business Transformation & Lean Practitioner



Introduction

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At **PBI**, we don't just teach transformation — we deliver it. As a business improvement specialists, our core expertise lies in **coaching**, **leadership development**, and hands-on **transformation delivery** across industries.

Our SQA-accredited training courses were developed to build internal capability within client organisations—equipping teams with the knowledge and context behind the tools we implement. Their effectiveness led to demand beyond project work, and today, as an SQA-Accredited Training Centre, we deliver these high-impact courses as standalone programmes. Whether building internal capability or embedding a culture of transformation, our training empowers teams with practical, applied knowledge - delivered by the same coaches driving real change in real businesses.

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Business Transformation

SCQF Level 9, delivered at Degree-level Standard

BUSINESS TRANSFORMATION





SQA SCQF LEVEL 9

DELIVERED AT BA DEGREE-LEVEL STANDARD

WHO IS THIS COURSE FOR?

Industry professionals, team leaders, and senior managers involved in, or responsible for, leading business transformation initiatives.

WHAT WILL YOU GAIN?

- Practical strategies to plan, lead, and sustain transformation
- Tools for strategic planning, KPIs, OKRs & change management
- @ Insights into innovation, agility & data-driven decision-making
- The confidence to align people, processes & technology
- An Internationally recognised SCQF Level 9 accreditation



Business Transformation

Overview

The 1-day Business Transformation course equips managers with essential skills and knowledge in **business transformation**, **leadership**, **strategic planning**, **change management**, **innovation**, **and data-driven decision-making**.

Attendees will gain a comprehensive understanding of how to **effectively plan, execute, and sustain transformation initiatives within their organisations.** The course integrates insights from multiple modules to provide **practical, actionable strategies** for achieving significant improvements in performance and efficiency.

As part of the course offering for closed cohorts (minimum of 5 attendees), **PBI also provides a half-day post-course coaching session**, supporting business leaders in shaping a tailored roadmap to drive their transformation agenda forward.

Participants will explore how to lead purposeful change by **developing a clear strategy and aligning their people, processes, and technology** to new business goals.

The course content is focused on skills which deliver **tangible results and sustainable benefits** in the business environment. It encourages a mindset shift, enhancing agility, innovation, and strategic thinking among leadership teams.

Upon successful pass of course exam (optional), participants will receive **SCQF Level 9** qualification and certification from SQA Scottish Qualifications Authority. **Internationally recognised** qualification and **delivered to a BA Degree-level standard**.

Business Transformation Course - Module Summary

Module 1: Introduction to Business Transformation

This module lays the groundwork by defining what business transformation is, why it matters today, and the core elements, people, processes, and technology, that must be aligned to new goals. Attendees gain a clear, shared framework for change and learn to spot opportunities for improvement, equipping them to champion transformation from day one.

Module 2: Understanding Organisational Change

Here we explore the three types of change (strategic, structural, cultural), the four stages organisations move through, and common barriers such as resistance and resource constraints. Participants learn to assess readiness with tools like SWOT, PESTLE, and Value-Stream Mapping, enabling them to diagnose issues early and craft robust, tailored change plans.

Module 3: Leadership in Transformation

This module unpacks the role, traits, and strategies of effective transformational leaders, including vision setting, adaptive leadership, clear sponsorship, and resilience. Through case studies and challenge-driven discussions, attendees develop the skills to inspire teams, navigate complexity, and sustain momentum, building a culture of commitment and accountability.

Module 4: Envisioning, Strategic Planning & Change Frameworks

Participants learn to articulate and communicate a compelling vision and translate it into actionable roadmaps using strategic tools such as OKRs, SMART goals, ADKAR, Kotter and Balanced Scorecards, along with operating rhythms like the Strategic Framework, Campaign Rooms, and Daily Huddles. This alignment ensures every team member understands how their work drives the organisation toward its long-term goals.

Module 5: Innovation & Agility

Focusing on the intersection of creativity and speed, this module introduces methods for fostering an innovation-friendly culture with design thinking, labs, digital platforms, and AI, while embedding agile practices in structure and leadership. Attendees leave with practical approaches to pilot new ideas rapidly, respond to market shifts, and embed a continuous-learning mindset.

Module 6: Data-Driven Decision Making

Here we dive into collecting, analysing, and leveraging data to guide both strategic and tactical decisions. Through KPIs, Balanced Scorecards, analytical techniques from descriptive to prescriptive, and governance best practices, participants learn to build trust in data, break down silos, and use real-time insights to drive performance and course-correct quickly.

Module 7: Managing Stakeholder Relationships

This module covers how to identify, categorise, and engage both internal and external stakeholders using tools like Power/Interest grids, RACI, and Key Role Mapping. Attendees discover tailored communication plans, feedback loops, and mitigation strategies to secure buy-in, minimise resistance, and ensure smooth collaboration throughout the transformation journey.

Module 8: Execution, Implementation, Sustainability & Continuous Improvement

The final module integrates all prior learnings into a continuous-improvement operating rhythm. Participants master triage and prioritisation, agile execution techniques such as Kaizen events, huddles, and Campaign Rooms, and sustainment practices including reinforcement, feedback loops, and leadership sponsorship, embedding change as business as usual for lasting impact.

Additional information

Attendees will benefit from

- An internationally recognised qualification (SCQF Level 9), delivered at degreelevel standard.
- Clarity on how to align people, processes and priorities to successfully lead and sponsor transformation.
- **Confidence to take ownership of change**, with practical tools to support planning, engagement and execution.
- Frameworks to identify the right initiatives and deliver them effectively across the organisation.
- Strategies to overcome resistance and sustain momentum, using proven models like ADKAR and Kotter's 8-Steps.
- A clear understanding of their leadership role in transformation, and how to support their teams to deliver results.

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Course Expectations

- Attend the full day, no step-outs.
- Participate fully in the individual tasks, group exercises and discussions.
- Undertake the exam (optional) at the end of the 1 day course to gain external SQA Internationally recognised, Degree-level equivalent qualification.
- Expectation that participants will **identify improvement opportunities** in their own areas of expertise.
- Optional Engage with PBI post course on helping deliver the improvement initiatives that have been identified by your employees.

FAQS

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Do attendees receive a certificate upon completion?

The BT Course is an SQA SCQF Level 9 accredited course, delivered to a Bachelor's Degree-level standard. It is also internationally recognised. Upon completion of the course and passing the exam, each attendee will receive an SQA/PBI certification of completion by mail. The SQA stamp is the one present on any Scottish university qualification.

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Are there any prerequisites to the course?

No prior knowledge is required. The course is designed to cover Business Transformation at various levels and stages within an organisation, making it applicable to any type of transformation a participant's organisation might be undergoing. However, there is an expectation that there is a significant amount of prereading done (all pre-reading material provided by PBI) before you attend the course.

What is the course delivery like?

The BT Course will be delivered by our coaches using Prezi, which is a non-linear presentation software. The course will be heavily weighted on the information slides, as well as industry and personal Case Study examples which support the frameworks, methodologies and techniques discussed throughout the course. There will be plenty of time for classroom discussion, debate and deep-dives. The course also includes some group exercises.

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Is the Business Transformation Course eligible for CPD points/hours?

Yes. The BT course carries SCQF Credit Points (3), where 1 SCQF credit point equals 10 hours of assessed learning. These can be used by delegates as CPD evidence depending on their professional body's policies.

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What materials are you provided with?

- Course material presented by the Coaches, supplied as a PDF.
- An Information Pack containing comprehensive pre-reading and support material for each slide.

FAQS

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Can you provide details about the exam?

Open-book 90-minute exam at the end of the day - ~70% pass grade required across each Learning Outcome. Course sat and exam passed to receive SQA certification.

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Where is the training delivered?

Both courses can be run online or in-person. In-person training can be conducted on the clients' premises in closed cohorts, which is preferred, or we can hire a venue that is easily accessible for attendees.

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How do we know your material is to that SQA standard?

All our training courses go through a rigorous external accreditation process set by the Scottish Qualifications Authority (SQA). We don't determine the level or credit points ourselves—these are independently assessed and awarded by SQA to ensure our courses meet their high educational and industry standards.

As an SQA-approved centre, we are subject to regular quality assurance reviews, meaning our course content, assessments, and delivery methods are continuously monitored to maintain compliance with SQA's strict criteria. This ensures that when participants complete our training, they receive a globally recognised qualification that meets the required learning standards.



Lean Practitioner

SCQF Level 7, delivered at HNC-Level Standard

LEAN PRACTITIONER







SQA SCQF LEVEL 7

DELIVERED AT HNC-LEVEL STANDARD

WHO IS THIS COURSE FOR?

Team members, supervisors, and managers looking to build handson experience in Lean, Agile, and Business Agility.

WHAT WILL YOU GAIN?

- A strong foundation in Lean & Agile methodologies
- Practical skills to identify and implement improvements
- © Tools to reduce inefficiencies and enhance collaboration
- © Confidence to develop a culture of continuous improvement
- An Internationally recognised SCQF Level 7 accreditation



Lean Practitioner

Overview

The 3-day Lean Practitioner course teaches participants the **fundamentals of Lean & Agile** through practical exercises, building their knowledge of Business Agility.

It is designed to extend participants' understanding of Lean & Agile Ways of Working and how these approaches can be deployed to drive improvement across diverse business environments. During the course, participants are encouraged to identify and explore real opportunities for improvement within their own work areas, ensuring immediate relevance and application.

A key focus of the course is on **developing internal capability**. Attendees will gain the confidence and skills to **lead or support improvement activities** by understanding how to select and apply appropriate methods and tools. The course also introduces the principles of **sponsorship** - helping team members understand how to engage with and influence decision-makers to support change.

After completion, participants are encouraged to implement what they've learned through targeted improvements, **building momentum for continuous improvement across their functions.** The course content is very much focused on practical application, delivering **tangible results and long-term benefits** in a real-world setting.

Upon successful pass of course exam (optional), participants will receive SCQF Level 7 qualification and certification from SQA Scottish Qualifications Authority. This is an internationally recognised qualification, delivered to a Higher National Certificate (HNC) standard.

Lean Practitioner Course - Module Summary

Module 1 (Day 1):

Covers: What is Lean, Project Charter, High Performing Teams, Pipespool exercise, Sponsorship, Reflection.

Summary (Building Foundations for Lean Thinking):

This module introduces the principles of Lean and the importance of structured improvement. Participants explore what Lean really means through practical exercises like Pipespool, learn how to initiate change using a Project Charter, and understand the role of sponsorship and team dynamics in successful delivery. The day focuses on building high-performing teams and establishing the mindset required for sustainable continuous improvement.

Module 2 (Day 2):

Covers: Process Balancing / SMED, Rolled Throughput Yield (RTY), 5S, Kanban, Transactional Lead Time, Pipespool continued, Campaign Room, Strategic Framework, Reflection.

Summary (Tools for Process Improvement):

Day 2 dives into powerful Lean tools and how to apply them. Participants explore process balancing, SMED (quick changeover techniques), and 5S for workplace organisation. The concept of Kanban and transactional lead time are introduced alongside advanced metrics like Rolled Throughput Yield (RTY). Strategic frameworks such as the Campaign Room are discussed in the context of delivering improvement projects, with continued use of Pipespool to bring learning to life.

Module 3 (Day 3):

Covers: Daily Huddles, Mistake Proofing, Kaizen Event Simulation, Applying Your Learnings, Unit 1-3 Examination.

Summary (Embedding Lean in Daily Work):

The final module focuses on applying and embedding Lean principles in daily operations. Participants learn about daily huddles, mistake-proofing (Poka-Yoke), and how to design and deliver Kaizen Events. The module culminates in an engaging simulation and reflection, helping participants translate course learning into tangible workplace actions. The session ends with an assessment to consolidate understanding and measure capability development.



Additional information

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Who should attend?

The LP Course is aimed at **individuals at all levels of an organisation**, who are keen to understand the fundamentals of Lean and Agile and build practical knowledge of Business Agility.

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Attendees will benefit from

- An internationally recognised qualification (SCQF Level 7), delivered at HNC-level standard.
- **Practical understanding of Lean & Agile tools** through hands-on exercises and real-world simulations.
- Improved ability to identify and solve business problems using structured methods like Kaizen, 5S, Kanban, and Campaign Rooms.
- Confidence to lead and participate in continuous improvement initiatives across their teams and departments.
- Skills to embed visual management and high-performance behaviours into daily operations.
- **Knowledge of sponsorship and team dynamics** to drive cross-functional collaboration and deliver measurable results.

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Course Expectations

- Attend the full 3 days, no step-outs.
- Participate fully in the individual tasks, group exercises and discussions.
- Undertake the exam (optional) at the end of the 1 day course to gain external SQA Internationally recognised, HNC-level equivalent standard.
- Expectation that participants will **identify improvement opportunities** in their own areas of expertise.
- Optional Engage with PBI post course on helping deliver the improvement initiatives that have been identified by your employees.

FAQS

Do attendees receive a certificate upon completion?

The LP Course is an SQA SCQF Level 7 accredited course, delivered to a HNC level. It is also internationally recognised. Upon completion of the course and passing the exam, each attendee will receive an SQA/PBI certification of completion by mail. The SQA stamp is the one present on any Scottish university qualification.

Are there any prerequisites to the course?

No prior knowledge is required and no pre-reading required.

♦ What is the course delivery like?

The LP Course will be delivered by our coaches using a combination of Powerpoint and either MURAL (virtual) or practical exercises (in-person). There are practical simulations that run throughout the whole course, giving you the experience of the most common approaches to resolving issues, the rigour in implementation and the role of leadership no matter where you are in the organisation. There will be multiple practical exercises throughout each day as well as reflection time and classroom discussions.

→ Is the Lean Practitioner Course eligible for CPD points/hours?

Yes. The LP course carries SCQF Credit Points (3), where 1 SCQF credit point equals 10 hours of assessed learning. These can be used by delegates as CPD evidence depending on their professional body's policies.

What materials are you provided with?

Course material presented by the Coaches, supplied as a PDF.

FAQS

Can you provide details about the exam?

Open-book 3-hour exam at the end of the last day (day 3) - ~70% pass grade required across each Learning Outcome. Course sat and exam passed to receive SQA certification.

Where is the training delivered?

Both courses can be run online or in-person. In-person training can be conducted on the clients' premises in closed cohorts, which is preferred, or we can hire a venue that is easily accessible for attendees.

◆ Do you offer post-training support?

PBIs courses are presented by experienced Coaches with over 20 years of practical experience. Unlike academic courses, our focus is on real-world implementation. We offer post-course implementation support to help attendees apply what they have learned and address any challenges they may face in their transformation journey.

→ How do we know your material is to that SQA standard?

All our training courses go through a rigorous external accreditation process set by the Scottish Qualifications Authority (SQA). We don't determine the level or credit points ourselves—these are independently assessed and awarded by SQA to ensure our courses meet their high educational and industry standards.

As an SQA-approved centre, we are subject to regular quality assurance reviews, meaning our course content, assessments, and delivery methods are continuously monitored to maintain compliance with SQA's strict criteria. This ensures that when participants complete our training, they receive a globally recognised qualification that meets the required learning standards.



Course Pricing

Pricing - Courses

Business Transformation Course, SCQF Level 9, delivered to Degree-level Standard

- **Minimum 5 attendees** per course, maximum of 10 attendees per cohort.
- £1,950 + VAT per individual attendee.
- A discount will apply if the minimum number of attendees (5) is filled for a closed cohort, at £1,700 + VAT, per attendee (13% discount).

Lean Practitioner Course, SCQF Level 7, delivered to HNC-level Standard

- **Minimum 10 attendees** per course, maximum of 16 attendees per cohort.
- £1,750 + VAT per individual attendee.
- A discount will apply if the minimum number of attendees (10) is filled for a closed cohort, at £1,500 + VAT, per attendee (14% discount).





Testimonials

VP of Transformation, BP

→ Testimonial

I just wanted to share a few reflections from my time working with PBI Ltd during my role as VP Transformation at BP, where I was accountable for transforming ways of working to improve business outcomes in the North Sea.

PBI's training and coaching support played a critical role in helping us make meaningful progress in some of our most business-critical areas. While the technical delivery was important, the real turning point came through the structured training programmes that supported a broader cultural shift. As the methods were applied, demand grew, more and more leaders asked to be involved and trained.

We increased the number of PBI coaches but also significantly expanded our internal training offer, running everything from "come and see" taster sessions to comprehensive training programmes that enabled BP to develop its own qualified internal coaches.

The Executive Leadership Team led by example, attending a training course that proved to be a real game changer in driving the collaborative behaviours we needed. Their direct reports followed, receiving training from PBI's professional trainers and achieving SQA-certified qualifications. As the impact became visible, particularly in culture and cross-functional collaboration, other BP regions began requesting access to the same training and support.

Years later, the same principles and training-led practices continue to underpin how BP North Sea operates, embedded and championed by both leaders and staff.

Thank you for the opportunity to share this.

- Peter Miller

Former VP of Modernisation & Transformation BP



BT - Customer Testimonials

Operations Director, National Logistics Provider

The Business Transformation course with PBI was a real turning point for our leadership team. It didn't feel like generic training, it was aligned to our actual challenges, helping us build clarity, strategic direction and momentum. The coaching throughout helped us shift from firefighting to structured improvement planning, and we now feel far more capable of leading change with confidence.

Head of Transformation, Renewables Sector

PBI's Business Transformation course gave our senior leaders a common language and approach to sponsor change initiatives effectively. The mix of strategic tools and live coaching was invaluable – it has definitely helped us accelerate decision-making and deliver more consistent outcomes across departments.

Managing Director, Food Manufacturing Group

We brought PBI in to support our change journey at board level, and their Business Transformation programme exceeded expectations. Their coaching-first model gave us space to reflect, challenge assumptions, and lead transformation with more purpose. We're now driving real cross-functional improvements, with stronger accountability and clarity of ownership.

Finance Director, NNS Department, 0&G Sector

PBI's Business Transformation course helped unlock a step-change in how our leadership team drives improvement. It challenged our thinking, introduced a structured way to prioritise change, and has helped us lead with more clarity and intent. The balance of learning and coaching really stood out, this wasn't just theory, which made the course relevant to our context.

LP - Customer Testimonials

Site Manager, National Food Producer

The Lean Practitioner training has completely shifted how our supervisors and team leads approach problems. They now use visual tools, root cause analysis and team huddles with confidence. PBI's approach made Lean accessible, and the coaching ensured we could immediately apply it to real business issues.

Head of Operations, Manufacturing Site

This course gave our delivery managers a clear understanding of lean and agile thinking, and how it applies in our day-to-day work. PBI's coaching style really helped bring it to life. The team now actively looks for ways to reduce waste and make improvements. The cultural shift has been immediate.

Team Leader, Engineering Services Business

The Lean Practitioner course was incredibly practical and impactful. Our team left with real tools they could apply straight away, from process mapping to daily stand-ups. It's changed how we run meetings, how we solve problems, and how we manage our time. Highly recommended.

Continuous Improvement Lead, FMCG Sector

We enrolled our entire middle management team on PBI's Lean Practitioner training and the feedback has been outstanding. It's practical, engaging, and above all, useful. The sessions helped build confidence in using Lean tools, and we've already seen gains in productivity and communication.



Case Studies

Walker's Shortbread, FMCG Food Manufacturing

Courses Delivered

- Business Transformation (Leadership Teams)
- Lean Practitioner (Operational & Delivery Teams)

Business Need

With no prior Lean or Agile structure, Walker's needed to build transformation capability across both leadership and operations. The aim was to embed new ways of working that could address yield loss, inefficiencies, and a lack of structured improvement processes. Leaders required a strategic framework to align teams, while frontline managers needed tools to identify and solve day-to-day process issues.

Training Approach

The Business Transformation course was delivered to the Leadership Team, focusing on leading change, aligning strategic priorities, and building sponsorship capability. This was followed by Lean Practitioner cohorts drawn from Production, Engineering, Technical, NPD and Supply Chain functions. Multiple cohorts were run over a 12-month period to build capability and drive improvement culture across the business.

♦ Outcomes

The training laid the foundation for a coaching-led Lean rollout. Leaders gained the ability to sponsor and support improvement activity, while delivery teams implemented Lean tools into day-to-day operations. Cultural maturity and engagement increased, resulting in tangible business benefits including:

- 40+ internal staff trained across BT and LP programmes, strengthening CI capability
- £877,000+ annual yield improvement
- £480,000+ in material savings via process control and waste reduction
- Improved UK OTIF (On Time In Full) of 10% and Int OTIF of 26%, vs 2023
- Implementation of industry-standard NPD stage-gate process

♦ Testimonial

"The transformation in our culture since PBI's training is remarkable. From senior leaders to line managers, we're seeing a new level of ownership and improvement activity. The tools were understood, but also used, and that's what's made the big difference for us."

- Procurement Director, Walker's Shortbread



TotalEnergies UK, Oil & Gas E&P

Courses Delivered

- Business Transformation (Senior Managers & Project Leaders)
- Lean Practitioner (Wider Continuous Improvement Team)

Business Need

TEPUK wanted to accelerate the delivery of its internal Continuous Improvement programme by upskilling both leaders and CI practitioners. There was a need for a structured approach to engage more departments, empower people at all levels, and drive consistent process improvements across a complex operational environment.

Training Approach

PBI delivered a Business Transformation course for UK senior managers and project leaders focused on strategic alignment, sponsorship, and change enablement. Simultaneously, Lean Practitioner training was delivered to CI professionals and area champions across functions including Finance, Engineering, Exploration, Projects, and HR. The courses were delivered on-site to maximise engagement and integrate real business challenges into learning.

Outcomes

Teams quickly applied what they had learned, resulting in accelerated improvement delivery and a measurable uplift in engagement across departments. Strategic initiatives gained stronger sponsorship and clearer prioritisation.

- Faster **uptake of CI tools** across the department each team (5) had their own Daily Huddle Boards and a daily Campaign Room running for the department leaders
- Increased cross-functional alignment
- Higher visibility of project outcomes
- Elevated credibility of CI teams **Operating Rhythm and CI Pipeline built** to manage and develop improvement initiatives from across the department

Testimonial

"The dual focus on leadership and delivery teams allowed us to create momentum quickly. PBI's coaching-led training bridged the strategy-execution gap and has helped embed a much stronger CI mindset across the business."

- CI Programme Lead, NNS Department, TEPUK



LightsourceBP, Renewables

Courses Delivered

• Lean Practitioner (All Levels - via internal academy)

Business Need

LSBP aimed to embed Lean and Agile principles across its global teams as part of its internal academy rollout. The goal was to create a common language and set of tools for problem solving and continuous improvement, enabling decentralised decision-making and driving scalable growth in a fast-moving sector.

Training Approach

PBI co-designed and delivered a Lean and Agile Training Passport, delivering Lean Practitioner training to 100+ employees globally (EU / N.America, / S.America / Australia). The course was tailored to suit a mixed audience from PMO, Procurement, Operations, and Support Functions. Delivered digitally and face-to-face, the training formed part of a broader capability-building programme and was integrated into the company's digital learning platforms.

♦ Outcomes

The training established a practical foundation for continuous improvement. Participants were actively involved in identifying and leading improvement initiatives in their areas.

- Over **75% of learners engaged weekly** in improvement activity
- 100+ employees trained in the Lean Practitioner course
- Faster onboarding into improvement methodology
- Common language and framework across international teams
- **Stronger internal pipeline** of CI leaders (internal development)

Testimonial

"PBI helped us equip our teams with the mindset and practical tools they needed to lead change, a key step towards empowerment of individuals and teams we were aiming for. The improvement activity that followed has been employee-driven and deeply aligned to our culture and new ways of working."

- PMO Lead, LSBP





practical business improvements delivering business agility

