

A background image of a middle-aged man with glasses and a beard, smiling while sitting at a desk with a laptop. The image is slightly blurred and has a blue tint.

A Provider's Guide to Open CPD

What is included in your account, how the platform handles the complexity, and what a well-run CPD programme looks like in practice.

Who this is for

You deliver training. You know your subject, your learners, and the standards your sector expects. This guide is about what the Open CPD platform does to support your programme: the tools that come with your account, how each one works, and how certificate issuing fits naturally into your delivery without adding complexity to what you already do well.

You will find

A practical overview of everything in your account: the tools, the infrastructure, and how each part of the service works. Written for someone who runs training, not someone who manages software.

You will not find

A complicated system or a steep learning curve. Open CPD is designed to fit around the way you already run your training business. If you still have questions about what CPD accreditation means, A Plain Guide to CPD Accreditation has those answers.

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The training is yours. The platform is ours.

OPEN CPD PROVIDES

- Hosting your course profiles and certificate records
- Generating and delivering certificates, digital badges, and achievement pages
- Running the public verification database
- Storing every record permanently, so certificates remain verifiable for years
- Providing the tools described in this guide

YOUR PROGRAMME

- Defining the aims, skills and outcomes for each course. CPD Genie can draft a first version from your existing materials.
- Delivering your training and standing behind its quality
- Knowing and applying the requirements and standards of your sector
- The content and marketing of your courses. Open CPD does not host training or advise on course subject matter.

WHAT THIS MEANS IN PRACTICE

Issuing certificates to a full cohort takes a few minutes. Once sent, the platform handles delivery, badge issuance, and the verification record automatically. The training and the quality judgements are yours. Everything else is not.

Marketing your accreditation

Open CPD provides a set of resources to help you communicate the value of your accreditation to learners, employers, and clients. None of them require anything from you beyond using them.

Your CPD membership certificate

As an active Open CPD member you receive a CPD membership certificate, valid for 12 months from your last payment date. Display it on your website, share it in proposals, or include it when responding to tenders. It is evidence of your active membership.



Accreditation messages

Your account includes a set of logos and sample messages ready to use across your website, course listings, email footers, and printed materials. Use whichever phrasing fits the context: "Powered by Open CPD" or "Systems accredited through Open CPD."

Sample achievement page and digital badge

A live example to show prospective learners before they have their own. Share it in conversations, on your course booking page, or in a follow-up email after a session.

[View sample achievement page](#) →

The weekly Q&A webinar

Open to learners as well as providers. If a learner or colleague has a question about CPD accreditation that you would rather not field yourself, the open webinar is a practical answer.

open-cpd.com/QA →

Provider spotlight

Open CPD posts regularly about providers on the platform. If you would like to be featured or have content to share, get in touch.

[Contact us](#) →

CPD Readiness Scorecard

The CPD Readiness Scorecard reviews a course profile against CPD best practice and gives you a clear report. Think of it as a mirror: an independent read on how your documentation stands up, before you publish or before a tender.

What it checks is structural: whether your aims, skills and outcomes are clearly stated, whether your course structure is well defined, and whether your CPD points are proportionate to the learning involved. It does not assess the quality of your training content. That is your expertise and your responsibility. Open CPD does not endorse or validate training on that basis.

The result is a report you keep. Some providers run it as a routine check before publishing a new course. Others use it when they want a documented read before a specific contract or procurement process.

FREE REPORT

Scored report

An automatically generated score against the CPD framework, with a clear breakdown by section. Available for any course profile in your account at no charge.

FULL ASSESSMENT

Detailed written report

A full assessment with written commentary on each section, available for a small charge. Useful when you want something you can share with a client or include in a tender response.

A mirror, not an endorsement. The Scorecard reads your documentation, never your subject matter.

Learn more at open-cpd.com/cpd-readiness-scorecard →

CPD Genie

If writing aims, skills and outcomes from a blank page feels like the slowest part of getting a course onto the platform, CPD Genie is built for that moment. Upload your existing training materials, whether a slide deck, a course outline, a session plan or a handbook, and it drafts the aims, skills and outcomes for you, structured against the Open CPD framework.

You review the draft, edit it, and decide what goes on the platform. CPD Genie produces a starting point, not a finished product. The judgement stays with you throughout. It is free to use.

STEP ONE

Upload the materials you already have.

STEP TWO

Read the drafted aims, skills and outcomes.

STEP THREE

Edit, approve, and publish what you are happy with.

PARTICULARLY USEFUL WHEN

You are setting up a catalogue of several courses and want to move through the documentation step efficiently, or you are new to writing in aims, skills and outcomes format and want a concrete starting point rather than an empty page.

Access CPD Genie from your account dashboard. It is a drafting aid, not an assessor.

Activity and delivery types

When you create a course or event profile, you set both the delivery type and the activity type. Together they describe what kind of learning it is and how it is delivered. Open CPD accommodates the full range of formats that training providers actually use.

DELIVERY TYPE • STANDARD FORMATS

Online	The course runs entirely through a digital platform or video call
In Person	Face-to-face in a room
Webinar	Live, presenter-led online session with an audience
Hybrid	A mix of in-person and online attendance
Conference	An organised event with multiple sessions or speakers

ACTIVITY TYPE • EXTENDED RANGE

The five standard formats above are also available as activity types. The five below cover less conventional programmes, all of them ordinary things to run.

Self Guided	The learner works through materials independently, at their own pace
1:1 Coaching	Individual sessions between a coach and a single client
Assessed Prior Learning	Formal recognition of learning that has already taken place
Accreditation	A programme that accredits an existing body of work or competence
Interactive Online Training	Structured digital learning with interactive elements, assessments, or branching content

Certificate templates

Three certificate types cover the full range of learning activities. When you create a course profile, you choose the type that reflects what the learning involves.

COMPLETION

The most common type

For structured courses with defined aims, skills and outcomes, where the learner has completed the full programme.

Use when: you are running a scheduled course and learners have engaged with the content from start to finish.

ATTENDANCE

For events and programmes where the measure is presence, not the completion of a specific set of skills.

Use when: you are running a conference, a briefing, a lunch and learn, or any programme with no formal assessment. The certificate records that the learner was there.

APPRECIATION

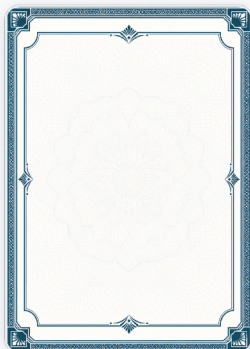
For recognising contribution rather than completion. A way of acknowledging someone who had a prominent or active role in a session.

Use when: you are thanking a speaker, recognising a leader in a group coaching session, or acknowledging a significant contribution rather than attendance.

All three types are available in five designs, in landscape and portrait, shown on the next page. Every certificate carries your name and logo, and a small Open CPD platform logo with the Powered by Open CPD line and verification ID at the foot.

The five certificate designs

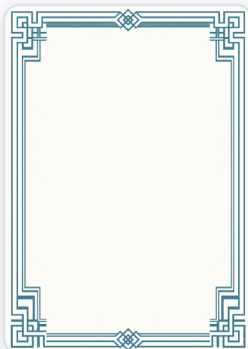
Every certificate type is available in the five designs below, in landscape and portrait. Your logo, the learner's details and the aims, skills and outcomes are laid over the design, and the wording is identical whichever you choose.



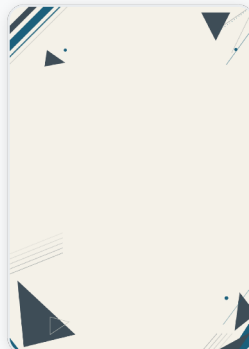
TRADITIONAL



CLASSIC



MODERN



ABSTRACT



MINIMALIST

CONSISTENT ON EVERY DESIGN

Your name and logo at the top, the learner's details and the aims, skills and outcomes in the body, and a small Open CPD platform logo with the Powered by Open CPD line and verification ID at the foot of each page.

NOT SEEING YOUR LOOK?

We install additional designs on request. Need a template matching your own brand or a client's? Ask, and we will add it to your account.

[ASK US](#)

Co-branding and partnerships

Where a course is delivered in partnership with another organisation, or on behalf of a client, a second name and logo can appear on the certificate alongside your own. Co-branding can be added to any individual course or event profile. Where you deliver regularly on behalf of the same partner, a partnership template lets you save that configuration and select it when setting up any course, rather than entering the partner details each time.

COMMON USES

In-house training programmes delivered for a corporate client. Courses run under a sector body's or membership organisation's banner. Co-branded conference sessions. The partner's name and logo appear on the certificate alongside yours. You remain the issuer.

Delivered by
Sinem Afrique Medical



In partnership with or on behalf of
Stratagility



Issuing certificates

Certificates, digital badges, and achievement pages are issued together, in a single action, the moment you confirm. There is no separate step for each.

INDIVIDUAL ISSUE

One learner at a time

Enter the learner's name and email address. The certificate, badge, and achievement page go out immediately. Used when issuing to a single delegate or topping up a cohort after a late completion.

CSV UPLOAD

A whole cohort in one step

Upload a spreadsheet of names and email addresses. The platform issues to the full list at once. Appropriate for any group completion: a workshop cohort, a conference, a quarterly programme intake.

AUTOMATION

Triggered from your LMS

If you already track completions in a learning management system, certificates can be triggered automatically via the Open CPD API or a Zapier connection. Issuing happens without anyone logging in.

WHAT IS ON THE CERTIFICATE

Every certificate is a multi-section document: the certificate page, course details (aims, skills and outcomes, CPD points, and your information), the learner's details, and a verification page with a unique ID. Additional documents can be published as part of the course details, such as a transcript, a session outline, or a resource pack. Set up once on the course profile and included in every certificate issued for that course.

Credits and top-ups

Credits control how many certificates you can issue. One credit issues one certificate, regardless of certificate type.

- Credits are valid for 12 months from purchase
- PAYG accounts: buy credits when you need them, no monthly commitment required
- Subscription accounts (Business and Professional): a fresh allocation arrives each month; unused credits roll over
- Additional credits can be purchased at any time from inside your account, at any plan level
- UK charities receive double credits on every purchase

Your current credit balance is visible in the account dashboard at any time.

Getting help

Support site

Step-by-step guides for every platform task: setting up a course profile, uploading a cohort by CSV, configuring a Zapier connection, adding a partner logo. Self-serve and always available.

support.open-cpd.com

Weekly Q&A webinar

Open drop-in, no agenda required. Bring a specific question or listen in without speaking.

open-cpd.com/QA

Book a 15-minute demo

A one-to-one call to walk through the platform using one of your own courses. Useful before you commit, or when you are setting up something more involved.

open-cpd.com/opencpddemo

TO GET STARTED

Ready when you are

Two straightforward options. Neither commits you to the other.

See pricing and get started

[OPEN-CPD.COM/PRICING](https://open-cpd.com/pricing)

Pick the plan that suits your volume and set up your first course profile.

[SEE PRICING](#)

Book a 15-minute demo

ONE CALL, YOUR QUESTIONS

Bring one of your own courses and walk through the platform together.

[BOOK A DEMO](#)

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Version 1.0 · August 2026

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