



Chartered
Insurance
Institute
Standards. Professionalism. Trust

2025 Training Catalogue



Inspiring Growth, Empowering Change

cii.co.uk

About us

The Chartered Insurance Institute (CII) is a professional body dedicated to building public trust in the insurance and personal finance professions. Over 122,000 members commit to high professional standards and continuing professional development.

We work with businesses to develop bespoke, company-wide solutions that ensure competitive advantage by enhancing employees' technical and professional competence.

Success in CII qualifications is universally recognised as evidence of knowledge and technical expertise.

Our members are able to drive personal development and maintain their professional standing by adhering to our Code of Ethics and by accessing a range of learning services.

Find out more at: cii.co.uk

Our vision

Our vision is to build public trust across the insurance and personal finance professions by providing relevant learning, insightful leadership and an engaged membership. Driving professional standards is at the heart of everything we do. Ethical conduct and technical competence are supported by our Code of Ethics and qualifications, designed in conjunction with sector practitioners and registered with Ofqual in the Regulated Qualifications Framework.



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CII training: helping you stay ahead of the curve!

As part of our work to develop professional standards in our sector, the CII provides a comprehensive range of training and development solutions. We offer workshops to employers and individuals covering exam revision, technical training and business and leadership topics.

Exam revision training can really help candidates identify areas to focus on, address areas of confusion or weakness and build confidence ahead of the exam itself. We can offer revision support across all our units and qualifications through our network of highly-qualified subject experts.

Our technical training is designed to ensure delegates have the knowledge needed to stay sharp in their chosen areas of expertise, or can add valuable expertise to aid career development. Our expert training team are highly skilled and experienced in their areas of specialism and can offer training at all levels.

We also have a growing offering of business and leadership topics intended to ensure our members and customers have access to high quality personal and professional development.

Whatever your individual or corporate training needs, we hope to help. In the following pages, you will find further details of our current offering. Should you have any queries, please get in touch using the contact details on the relevant page.

You can select from over 100 workshops, covering foundation, intermediate and advanced levels. As the experts in insurance and financial planning learning we understand what it takes to deliver first-class training and we offer in-house and bespoke training solutions to meet employers' exact requirements. Our training offers great quality and value, and we consistently achieve high standards of delegate feedback and offer member and group savings. Should you have queries, please get in touch with us, and email business.enquiries@cii.co.uk.



Why choose us?

The CII is committed to helping you or your staff develop and maintain the knowledge and skills needed for a successful career. As the leading professional body in insurance and financial planning, our commitment to professional development is backed by an unrivalled understanding of what it takes to deliver first-class face-to-face training solutions.



Sector expertise

No one has a deeper knowledge or wider experience of people development in the insurance and financial planning profession than the CII. This insight – gained through established customer relationships, comprehensive market engagement and direct client feedback – is used to develop topical, practical and affordable training workshops.



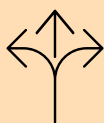
Expert tutors

The value of any training workshop is governed by the quality of the tutor. That's why all of our tutors are carefully chosen for their master expertise and proven ability to deliver first-class training. Our tutors combine academic expertise with significant sector experience, helping to ensure workshops address the practical needs of insurance and financial planning professionals. We introduce a number of our tutors throughout this brochure.



CPD specialists

Keeping abreast of technical and market developments is a central and ongoing part of any successful career. It also satisfies regulatory obligations and the requirement for qualified CII members to keep their knowledge up to date. Our workshops are designed to CII Continuing Professional Development (CPD) accreditation standards and offer a practical and structured way to develop and maintain required knowledge and skills.



Flexible approach

We offer an extensive programme of more than 100 training workshops across numerous disciplines, in many cases from foundation through to advanced level. We also offer in-house and bespoke training solutions to meet employers' exact requirements. So, as well as being able to run any of our workshops at an employer's premises for groups of staff, we can also adapt existing workshops or create completely new workshops.

Further, depending on your needs, we offer the opportunity for you to build your desired programme from a combination of workshops outlined in this directory.





Personal Finance Revision Workshops

Accelerate your exam performance with our online interactive revision workshops.

Advanced Diploma - Assignment Writing Workshop

Description

This half-day workshop provides an overview of how to research, structure and present CII Advanced Diploma assessments.

Summary

 **Duration:** 1/2 day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

It is ideal for those just about to begin their Advanced Diploma coursework studies, no matter what subjects you have chosen.

Learning Outcomes

By the end of the workshop participants will be able to:

- Explain how to research and structure assignments
- Describe how to clearly answer questions by addressing all elements of the examiners' marking matrix

Programme

- Breaking-down the assignment question
- Practical research
- Understanding the marking matrix and implications for the assignment framework
- Using multiple sources to answer assignments
- Creating top quality bibliography and reference list
- Layout, readability and style
- Finding sources that are current and relevant
- Framing insightful conclusions

Advanced Diploma units (credits)

- 530 Economics and Business (30)
- 820 Advanced claims (30)
- 930 Advanced insurance broking (30)
- 960 Advanced underwriting (30)
- 945 Marketing insurance products and services (30)
- 990 Insurance corporate management (30)
- 991 London market insurance specialisation (50)
- 992 Risk management in insurance (30)
- 993 Advances in strategic risk management in insurance (50)
- 994 Insurance market specialisation (50)
- 995 Strategic underwriting (30)
- 996 Strategic claims management (30)
- 997 Advanced risk financing and transfer (30)

AF1: Personal Tax and Trust Planning

Description

This interactive workshop is designed to accelerate candidates' learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group. Typically, our exam revision workshops are two or three days' duration, depending on the subject and level of the unit.

Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the AF1 unit and require in-house preparation for the exam.

Learning Objectives

The objective of Personal Tax and Trust Planning (AF1) is to develop in-depth financial planning skills related to personal tax and trusts.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this workshop delegates will be able to:

- Demonstrate their understanding of the UK income, capital gains and inheritance tax systems.
- Accurately calculate income tax, capital gains tax and inheritance tax liabilities.
- Understand the rules of the UK trusts available.

AF4: Investment Planning

Description

This interactive workshop is designed to accelerate candidates' learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group. Typically, our exam revision workshops are two or three days' duration, depending on the subject and level of the unit.

Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the AF4 unit and require in-house preparation for the exam.

Learning Objectives

The objective of Investment Planning (AF4) is to develop in-depth financial planning skills related to investments and the management of investment portfolio.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this workshop delegates will be able to evaluate the complex needs of clients and recommend appropriate solutions based upon detailed understanding and analysis of the:

- Economic environment and its impact on investment performance and investment decision making.
- Features, risks and returns of direct financial investments.
- Features, risks and returns of collective investment products, including alternative investments.
- Individual company performance and company accounts.
- Types and measurement of risk and returns.
- Main principles governing how to construct an investment portfolio, investment styles and the management of risk and return.
- Range of portfolio management services.

AF5: Financial Planning Process

Description

This interactive workshop is designed to accelerate candidates' learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group. Typically, our exam revision workshops are two or three days' duration, depending on the subject and level of the unit.

Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the AF5 unit and require in-house preparation for the exam.

Learning Objectives

The objective of Financial Planning Process (AF5) is to develop an understanding of the financial planning process when giving advice to clients.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this workshop delegates will be able to research and construct a financial plan that demonstrates:

- Understanding of the relationship and responsibilities between adviser and client and the need to establish the scope of the planning brief.
- Evaluation of the different remuneration strategies available and how they might suit the different services required by clients.
- Understanding and evaluation of the client's personal circumstances and financial status.
- Understanding and evaluation of the client's financial objectives, including the importance of prioritising those financial objectives.
- Understanding of the assumptions underlying the financial plan.
- Understanding of what is meant by risk (including capacity of loss), the various risks faced by the client and the importance of the client risk profile in formulating a financial plan.
- Evaluation of the different options available to the client with relevant evidence.
- The ability to put forward an appropriate financial plan based upon analysis of client objectives, circumstances and options.
- The ability to explain the meaning of any technical terms, the features and benefits of proposed products and the consequences of the proposed workshop of action.
- Understanding of the importance of documenting any changes to the plan required by the client and how to document such changes.
- Understanding of the review process and its significance in the overall financial planning process.

AF7: Pension Transfers

Description

This interactive workshop is designed to accelerate candidates' learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group. Typically, our exam revision workshops are two or three days' duration, depending on the subject and level of the unit.

Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the AF7 unit and require in-house preparation for the exam.

Learning Objectives

The objective of Pension Transfers (AF7) is to develop the specialist knowledge and skills needed for advising on the transfer of safeguarded benefits. This unit brings you up to date with the fundamental aspects of the pension transfer process; the implications of transferring between different types of pensions; and develops your advice skills across a range of client circumstances and scenarios.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this workshop delegates will be able to use technical knowledge and analysis to:

- Understand the fundamental aspects of the pension transfer process.
- Understand the key issues that should be taken into account when considering a potential transfer of pension benefits.
- Advise on pension transfers in a range of client specific circumstances and scenarios.

CF1: UK Financial Services, Regulations and Ethics

Description

This interactive workshop is designed to accelerate candidates' learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group. Typically, our exam revision workshops are two or three days' duration, depending on the subject and level of the unit.

Summary

 **Duration:** 3-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the CF1 unit and require in-house preparation for the exam.

Learning Objectives

The objective of UK Financial Services, Regulations and Ethics (CF1) is to develop your understanding of the financial services industry including regulation and legislation.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this workshop delegates should be able to demonstrate a knowledge and understanding of the:

- Purpose and structure of the UK financial services industry.
- Different financial asset classes and product types.
- Process of giving advice and the main areas covered.
- Ethics, regulatory processes, rules and legislation underpinning UK financial services.
- Use of the financial regulators' powers and responsibilities to protect the market's integrity and the impact on individuals and firms of these regulators' powers.

CF6: Mortgage Advice

Description

This interactive workshop is designed to accelerate candidates' learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group. Typically, our exam revision workshops are two or three days' duration, depending on the subject and level of the unit.

Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the CF6 unit and require in-house preparation for the exam.

Learning Objectives

The objective of Mortgage Advice (CF6) is to develop your understanding of the various types of mortgage product and repayment options and the giving of mortgage advice.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this workshop delegates should be able to demonstrate a knowledge and understanding of the:

- House-buying process, from making an offer to completion and the key parties involved.
- Different types of borrowers and how to meet their individual mortgage needs.
- Different types of mortgage product and repayment options and their suitability for the client.
- Legislative and regulatory position of mortgages and the requirements of a mortgage adviser.

CF8: Long Term Care Insurance

Description

This interactive workshop is designed to accelerate candidates' learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group. Typically, our exam revision workshops are two or three days' duration, depending on the subject and level of the unit.

Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

Who should attend

If your company has a group who are studying the CF8 unit and require in-house preparation for the exam.

Learning Objectives

The objective of Long Term Care Insurance (CF8) is to develop your understanding of long term care (LTC) cover, including legal, taxation and regulatory issues and the responsibilities of local authorities.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this workshop delegates should be able to demonstrate a knowledge and understanding of the:

- Definition, purpose, and scope of long term care contracts and how they interact with State benefits and State-funded long term care.
- Main features and functions of the different types of contracts that can be used to fund long term care and how they can be arranged to meet an individual's needs.
- Principal legal, taxation and regulatory issues that are relevant to advice on long term care insurance.
- Importance of regular reviews to ensure that long term care insurance cover remains appropriate.

ER1: Equity Release

Description

This interactive workshop is designed to accelerate candidates' learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group. Typically, our exam revision workshops are two or three days' duration, depending on the subject and level of the unit.

Summary

 **Duration:** 1–2 day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the ER1 unit and require in-house preparation for the exam.

Learning Objectives

The objective of Equity Release (ER1) is to develop your understanding of the different types of equity release products, risks to the consumer associated with equity release and application of suitable equity release solutions according to the circumstances of different customers.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this workshop delegates should be able to demonstrate a knowledge and understanding of the:

- Principles of equity release and the types of schemes available.
- Suitability and affordability of the different types of equity release products.
- Risks to the consumer associated with equity release.
- Application of suitable equity release solutions according to the circumstances of different consumers.

FA1: Life Office Administration

Description

This interactive workshop is designed to accelerate candidates' learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group. Typically, our exam revision workshops are two or three days' duration, depending on the subject and level of the unit.

Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the FA1 unit and require in-house preparation for the exam.

Learning Objectives

The objective of Life Office Administration (FA1) is to develop your understanding of life and pensions issues, together with detailed guidance on the administration of these classes of business.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this workshop delegates should be able to demonstrate a knowledge and understanding of the:

- Basic product types, including group life.
- Principles of financial and medical underwriting.
- Policy issues likely to arise with life policies.
- Administration of life policies, including the different payment methods and consequences of non-payment.
- Handling of life policy claims.

FA2: Pensions Administration

Description

This interactive workshop is designed to accelerate candidates' learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group. Typically, our exam revision workshops are two or three days' duration, depending on the subject and level of the unit.

Summary

 **Duration:** 3-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

Who should attend

If your company has a group who are studying the FA2 unit and require in-house preparation for the exam.

Learning Objectives

The objective of Pensions Administration (FA2) develops your understanding of life and pensions issues, together with detailed guidance on the administration of these classes of business.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this workshop delegates should be able to demonstrate a knowledge and understanding of the:

- Regulatory and legislative environment governing pensions.
- Basic principles of pension taxation and administration.
- Basic pension product types, including group pensions.
- With-profits and unit-linked investments.
- Different pensions and options available when taking benefits.

J02: Trusts

Description

This interactive workshop is designed to accelerate candidates' learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group. Typically, our exam revision workshops are two or three days' duration, depending on the subject and level of the unit.

Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the J02 unit and require in-house preparation for the exam.

Learning Objectives

The objective of Trusts (J02) is to develop candidates' knowledge and understanding of the various types of trusts.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this workshop delegates will be able to:

- Understand legal principles associated with the creation and management of a trust.
- Understand main types of trusts that are common in the UK.
- Understand taxation considerations relevant to trusts.

J05: Pension Income Options

Description

This interactive workshop is designed to accelerate candidates' learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group. Typically, our exam revision workshops are two or three days' duration, depending on the subject and level of the unit.

Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the J05 unit and require in-house preparation for the exam.

Learning Objectives

The objective of Pension Income Options (J05) is to develop knowledge and understanding of pension crystallisation and the drawing of income via various options.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this workshop delegates will be able to:

- Understand the process and implications of decumulating pension funds and the issues facing clients and advisers.
- Understand decumulation options available to members of pensions schemes.
- Understand features, risks and tax treatment of the different options.

J07: Supervision in a Regulated Environment

Description

This interactive workshop is designed to accelerate candidates' learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group. Typically, our exam revision workshops are two or three days' duration, depending on the subject and level of the unit.

Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the J07 unit and require in-house preparation for the exam.

Learning Objectives

The objective of Supervision in a Regulated Environment (J07) is to provide an overview of the knowledge required to supervise someone who gives advice on regulated products under the FCA Training and Competence (T&C) requirements in the UK. This includes investment advisers, those who provide advice on mortgages and insurance, and some administration functions covered under the 'overseer' rules.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this unit, candidates will be able to understand:

- The supervisor's role in a regulated organisation
- The principles and practices of recruitment and training
- Attaining, maintaining and supervising competence
- Management information and performance standards
- Financial Services regulation and guidance
- The legal and regulatory aspects of employment and supervision

J10: Discretionary Investment Management

Description

This interactive workshop is designed to accelerate candidates' learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group. Typically, our exam revision workshops are two or three days' duration, depending on the subject and level of the unit.

Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the J10 unit and require in-house preparation for the exam.

Learning Objectives

The objective of Discretionary Investment Management (J10) is to develop knowledge and understanding of the role of the discretionary investment manager, and the ability to analyse and apply financial information and portfolio management skills.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this unit, candidates will be able to understand:

- The behaviour, performance, risk profile and correlation of key investment types
- Discretionary and non-discretionary portfolio management
- The principles of performance measurement, financial analysis and ratio analysis
- The principles of performance management and portfolio theory.

J12: Securities Advice and Dealing

Description

This interactive workshop is designed to accelerate candidates' learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group. Typically, our exam revision workshops are two or three days' duration, depending on the subject and level of the unit.

Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the J12 unit and require in-house preparation for the exam.

Learning Objectives

The objective of Securities Advice and Dealing (J12) is to develop candidates' knowledge and understanding of the features and risks of different securities, the structure and features of the securities market and relevant factors and considerations for appropriate investment recommendations.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this workshop delegates will be able to:

- Understand the features and risks of different securities.
- Understand the structure and features of the securities market.
- Understand relevant factors and considerations for appropriate investment recommendations.

LF1: Life and Pensions Foundations

Description

This interactive workshop is designed to accelerate candidates' learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group. Typically, our exam revision workshops are two or three days' duration, depending on the subject and level of the unit.

Summary

 **Duration:** 1–2 day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the LF1 unit and require in-house preparation for the exam.

Learning Objectives

The objective of Life and Pensions Foundations (LF1) is to develop knowledge and initial understanding of the life and pensions sector, its purpose, its customers and the financial solutions and operational practices that underpin delivery of good customer outcomes. The Award develops knowledge and understanding across key areas of the life, pensions and long-term savings market. This includes customer needs and solutions, the sector's value to society and the economy, and the importance of professional conduct and maintaining a customer focus.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this workshop delegates should be able to demonstrate knowledge and understanding of:

- The value of the life and pensions sector to society and the economy.
- Key customer needs relating to pensions, protection, investments and savings.
- A range of potential solutions available to meet customer needs.
- How individuals and organisations work as a profession to treat customers fairly and meet their needs effectively.

LP2: Financial Services Products and Solutions

Description

This interactive workshop is designed to accelerate candidates' learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The content will cover key areas of the syllabus and areas likely to be tested for the exam. There will also be focus on exam style questions with clear debriefs to aid understanding. The duration of each exam revision workshop can be tailored to the needs of your group. Typically, our LP2 exam revision workshops are two days' duration.

Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the LP2 unit and require in-house preparation for the exam.

Learning Objectives

The objective of Financial Services Products and Solutions (LP2) is to develop knowledge and understanding of customer needs, how financial services professionals and organisations identify and provide for these needs, including an understanding of key retail financial products such as savings, investments and tax wrappers.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this workshop delegates will be able to:

- Demonstrate their understanding of key areas of the exam syllabus.
- Clarify areas of the syllabus where they require further guidance.
- Refine their exam technique and ability to identify correct answers.
- Test their knowledge and practise with exam style questions.

R01: Financial Services, Regulation and Ethics

Description

This interactive workshop is designed to accelerate candidates' learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group. Typically, our exam revision workshops are two or three days' duration, depending on the subject and level of the unit.

Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the R01 unit and require in-house preparation for the exam.

Learning Objectives

The objective of Financial Services, Regulation and Ethics (R01) is to develop your knowledge and understanding of the financial services profession, including regulation, legislation and the Code of Ethics.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this workshop delegates will have investigated:

- The purpose and structure of UK financial services.
- How the retail customer is served by the financial services profession.
- Regulatory framework, powers and responsibilities to protect the consumer.
- Legal concepts and considerations relevant to financial advice.
- The CII Code of Ethics and its impact on the business behaviours of individuals.

R02: Investment Principles and Risk

Description

This interactive workshop is designed to accelerate candidates' learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group. Typically, our exam revision workshops are two or three days' duration, depending on the subject and level of the unit.

Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

Who should attend

If your company has a group who are studying the R02 unit and require in-house preparation for the exam.

Learning Objectives

The objective of Investment Principles and Risk (R02) is to develop your knowledge and understanding of investment products and the application of the investment advice process.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this workshop delegates will have investigated the:

- Characteristics, inherent risks, behaviour and correlation of asset classes and investment products.
- Macro-economic environment and its impact on asset classes.
- Merits and limitations of the main investment theories.
- Nature and impact of the main types of risk on investment performance.
- Performance of investments.

R03: Personal Taxation

Description

This interactive workshop is designed to accelerate candidates' learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group. Typically, our exam revision workshops are two or three days' duration, depending on the subject and level of the unit.

Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

Who should attend

If your company has a group who are studying the R03 unit and require in-house preparation for the exam.

Learning Objectives

The objective of Personal Taxation (R03) is to develop your knowledge and understanding of the UK taxation system, and the ability to analyse the taxation treatment of individuals and trusts during the investment advice process.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this workshop delegates will have investigated the:

- Basic structure of the UK tax system.
- Main taxes on income and capital that may be charged on individuals and trusts, the self-assessment system and how tax liabilities are computed.
- Taxation of investments as relevant to the needs and circumstances of individuals and trusts.

R04: Pensions and Retirement Planning

Description

This interactive workshop is designed to accelerate candidates' learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group. Typically, our exam revision workshops are two or three days' duration, depending on the subject and level of the unit.

Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the R04 unit and require in-house preparation for the exam.

Learning Objectives

The objective of Pensions and Retirement Planning (R04) is to develop your knowledge and understanding of pension and retirement planning issues.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this workshop delegates should be able to demonstrate an understanding of and ability to analyse the:

- Main tax and legal frameworks that govern retirement benefits under registered pension schemes.
- Features of defined contribution and defined benefit pensions.
- State retirement benefits available, including the risks and suitability of contracting out of the State Second Pension.

R05: Financial Protection

Description

This interactive workshop is designed to accelerate candidates' learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group. Typically, our exam revision workshops are two or three days' duration, depending on the subject and level of the unit.

Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the R05 unit and require in-house preparation for the exam.

Learning Objectives

The objective of Financial Protection (R05) is to develop knowledge and understanding of and ability to analyse financial protection planning issues.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this workshop delegates should be able to demonstrate an understanding of and ability to analyse the following:

- The purpose and scope of financial protection products and how they interact with State benefits.
- The main features and functions of the different types of contracts and how they are arranged in order to meet the individual client's protection needs.
- The main protection needs of businesses.

R06: Financial Planning Process

Description

This interactive workshop is designed to accelerate candidates' learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group. Typically, our exam revision workshops are two or three days' duration, depending on the subject and level of the unit.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the R06 unit and require in-house preparation for the exam.

Learning Objectives

The Financial Planning Practice (R06) unit has been developed to help advisers develop and demonstrate their financial planning capabilities.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

This unit enables candidates to demonstrate their expertise in the application of the financial planning process through combining and applying learning content from all the other units in the CII RQF Level 4 Diploma in Regulated Financial Planning:

- Financial services, regulation and ethics.
- Investment principles and risk.
- Personal taxation.
- Pensions and retirement planning.
- Financial protection.

R07: Advanced Mortgage Advice

Description

This interactive workshop is designed to accelerate candidates' learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group. Typically, our exam revision workshops are two or three days' duration, depending on the subject and level of the unit.

Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the R07 unit and require in-house preparation for the exam.

Learning Objectives

The objective of Advanced Mortgage Advice (R07) is to provide candidates with knowledge and understanding of the key elements of the mortgage process, specialist types of mortgage lending and to test candidates' ability to give appropriate mortgage advice to clients with complex needs and circumstances.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this workshop delegates should understand the following:

- Key elements of the mortgage process.
- Specialist types of mortgage lending.
- Appropriate mortgage advice to clients with complex needs and circumstances.



International Awards Revision Workshops
Certificated workshops to support your professional development needs.

W01: Award in General Insurance

Description

This interactive workshop is designed to accelerate candidates' learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group.

Summary

 **Duration:** 1–2 day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the W01 unit and require in-house preparation for the exam.

Learning Objectives/Workshop Benefits

The objectives of W01 are to provide candidates with the:

- basic principles of insurance;
- main legal principles related to insurance contracts;
- main regulatory principles related to insurance business; and
- key elements to protect consumers.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this workshop delegates will be able to:

- Understand the nature and main features of risk and insurance.
- Know the structure and main features of the insurance market.
- Understand the main legal principles governing insurance contracts.
- Understand the main regulatory and legal principles applicable to the transaction of insurance business.
- Know key aspects of ethics, corporate governance and internal controls.

W02: Award in General Insurance (non-UK) Arabic

Description

This essential workshop provides a solid foundation for anyone working or planning to work in the insurance industry. It is a mandatory requirement for obtaining the CERT CII certification.

This workshop is available in Arabic.

Summary

 **Duration:** 30 hours

 **No of Attendees:** 12–16

 **Format:** Virtual delivery/Face to Face

 **CPD:** Recognised

Who should attend

Delegates who are seeking or intending to work in the General Insurance sector

Learning Objectives

- Understand risk and its characteristics.
- Understand the principles of insurance and how they operate. Understand contract law.
- Understand insurance-related legislation.
- Understand internal controls.

Learning Outcomes

By the end of this workshop, candidates should be able to understand:

- The fundamental principles of insurance.
- The key legal principles of insurance contracts.
- The main legislative principles related to insurance operations.
- The core elements of consumer protection.

W04: Award in Customer Service in insurance (non-UK)

Description

This interactive workshop is designed to accelerate candidates' learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the W04 unit and require in-house preparation for the exam.

Learning Objectives/Workshop Benefits

The objectives of W04 are to provide candidates knowledge and understanding of the customer service within the context of an insurance environment.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this workshop delegates will be able to:

- Know how to fulfil customer requirements in the insurance sector.
- Understand the importance of customer feedback to improve service in the insurance sector.
- Understand the importance of good communication to maintain and build client relationships in the insurance industry.
- Know how to deal with conflict within an insurance environment.
- Understand the importance of keeping accurate and confidential records when dealing with customers.
- Know how to manage own workload and time to meet business requirements and timescales.
- Know how to work with others to achieve team and organisational objectives.
- Understand the sales process.
- Know how to increase sales activities.

WCE: Insurance Claims Handling (non-UK)

Description

This interactive workshop is designed to accelerate candidates' learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the WCE unit and require in-house preparation for the exam.

Learning Objectives/Workshop Benefits

The objective of WCE is to provide knowledge and understanding of the claims handling process including notification, assessment, settlement and associated financial factors.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this workshop delegates will be able to understand the following:

- The general principles in the claims handling process.
- Insurance products and associated services.
- Claims considerations and administration.
- Claims handling procedures and related claims services.
- The claims function and how it may be structured.
- Claims settlement.
- How expenses are managed.

WCA: Insurance Claims Handling (non-UK) Arabic

Description

This essential workshop provides a solid foundation for anyone working or planning to work in the insurance industry. It is one of the complementary materials required to obtain the CERT CII certification.

This workshop is available in Arabic.

Summary

 **Duration:** 30 hours

 **No of Attendees:** 12–16

 **Format:** Virtual delivery/Face to Face

 **CPD:** Recognised

Who should attend

Delegates who are working or intending to work in the general insurance sector.

Learning Objectives

This workshop provides the knowledge and understanding of the claims handling process, including notification, assessment, settlement, and related financial factors.

Learning Outcomes

By the end of the workshop, candidates will be able to:

- Understand the general principles of the claims handling process.
- Understand insurance products and associated services.
- Understand claims considerations and management.
- Understand claims handling procedures and related claims services.
- Understand the claims function and how it is structured.
- Understand claims settlement processes.
- Understand how to manage expenses effectively.

WUE: Insurance Underwriting (non-UK)

Description

This interactive workshop is designed to accelerate candidates' learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the WUE unit and require in-house preparation for the exam.

Learning Objectives/Workshop Benefits

The objective of WUE is to provide knowledge and understanding of the role of underwriting including identification, assessment and acceptance of risk, rating and relevant financial factors.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this workshop delegates will be able to understand the following:

- The material facts and information relating to the insurance underwriting process.
- Underwriting procedures relating to the insurance underwriting process.
- Insurance policies in relation to the insurance underwriting process.
- Renewals and cancellation in relation to the insurance underwriting process.
- Personal insurances in relation to the insurance underwriting process.
- Commercial insurances in relation to the insurance underwriting process.
- The main support/ancillary services available in the insurance industry.
- Underwriting considerations in relation to the insurance underwriting process.
- The principles and practices of pricing.
- Pricing factors within the context of the insurance underwriting process.
- Managing exposure within the context of the insurance underwriting process.

WUA: Insurance Underwriting (non-UK) Arabic

Description

This essential workshop provides a solid foundation for anyone working or planning to work in the insurance industry. It is one of the complementary materials required to obtain the CERT CII certification.

This workshop is available in Arabic.

Summary

 **Duration:** 30 hours

 **No of Attendees:** 12–16

 **Format:** Virtual delivery/Face to Face

 **CPD:** Recognised

Who should attend

Delegates who are working or intending to work in the general insurance sector.

Learning Objectives

This unit provides knowledge and understanding of the underwriting process, including risk identification, assessment, acceptance, classification, and relevant financial factors.

Learning Outcomes

- Understand the essential facts and information related to insurance underwriting operations.
- Understand underwriting procedures relevant to the insurance underwriting process.
- Understand insurance documentation in relation to the underwriting process.
- Understand renewal and cancellation processes in relation to insurance underwriting. Understand personal insurances in relation to insurance underwriting.
- Understand commercial insurances in relation to insurance underwriting. Understand core and auxiliary support services available in insurance services.
- Understand underwriting considerations relevant to the insurance underwriting process.
- Understand the principles and practices of pricing. Understand pricing factors.
- Understand exposure management within the context of the insurance underwriting process.

AWB: Award in Bancassurance (non-UK)

Description

This workshop provides knowledge and understanding of the financial planning process within a professional business environment and the core financial and life assurance products suitable to a client's needs.

The workshop is most suitable for Relationship Managers and Investment advisers specifically but not limited to Banking environment, where they might be offering Insurance products through a Bank.

Summary

 **Duration:** 30 hours

 **No of Attendees:** 12–16

 **Format:** Virtual delivery/Face to Face

 **CPD:** Recognised

Who should attend

Delegates who are working or intending to work in the general insurance or the financial planning sector specifically within a banking set up.

Learning Objectives

- The main elements of the financial services and insurance industry
- The main insurance products
- Savings and investment products
- Retirement planning products
- What constitutes good and ethical client practice

Learning Outcomes

- Know the main elements of the financial services and insurance industry as it relates to the bancassurance sector.
- Understand the main insurance products
- Understand savings and investment products
- Understand retirement planning products
- Understand the importance of the client fact find and how to identify client needs
- Understand what constitutes good and ethical client practice

AWF: Award in Financial Planning (non-UK) Arabic (AWA)

Description

Typical workshop for Financial Planners, Life Insurance & Endowment Advisers who wish to take their careers to the next level.

This workshop is also available in Arabic.

Summary

 **Duration:** 30 hours

 **No of Attendees:** 12–16

 **Format:** Virtual delivery/Face to Face

 **CPD:** CPD

Who should attend

Delegates who are working or intending to work in the general insurance or the financial planning sectors.

Learning Objectives

By the end of this workshop you will have knowledge & understanding of the financial planning process which includes the:

- Client's needs
- Fact finding process & Good practice
- Protection products
- Savings & Investment products
- Pension products

Learning Outcomes

- Detect the client's needs in every stage of life
- Know how to go through the fact-finding process
- Differentiate between what's considered bad practice and good practice
- Have an understanding of what protection products are available to the financial planner, and how they can use them to achieve the client's protection goals

AWP: Award in Investment Planning (non-UK)

Description

An adviser has a wide range of investment products from which to choose when making a recommendation to a client. Each category of asset has a potential role to play within a client's overall investment portfolio; however, each has a different risk/return profile. Each client has a different risk profile depending on their age, wealth, stage of life and personal preferences.

The workshop gives solid foundation for those advisers who are client-facing, in order to give the best advice according to the needs of the prospect client.

This workshop is also available in Arabic.

Summary

 **Duration:** 30 hours

 **No of Attendees:** 12–16

 **Format:** Format

 **CPD:** Virtual delivery/Face to Face

Who should attend

Delegates who are working or intending to work in the financial planning and investment planning sectors. Could also be beneficial for candidates who work in the general insurance sector.

Learning Objectives

At the end of this unit, candidates will be able to demonstrate knowledge and understanding of:

- Main macro-economic factors that impact upon investment returns
- Cash deposits, government securities and corporate bonds
- Equity-based investment and property investment
- Collective investment products and alternative investments
- The risks faced by investors and the importance of asset allocation

Learning Outcomes

- Understand the main macro-economic factors that impact upon investment returns
- Describe the importance of main economic indicators
- Describe the main features of cash deposit investments
- Understand the main features of government securities and corporate bonds
- Understand the main features of equity based investment products
- Understand the main features of property investment
- Understand the main features of collective investment products and alternative investments
- Understand the risks and returns faced by investors and how an investor's risk profile is determined
- Describe the importance of asset allocation in the investment process
- Describe other main issues that impact upon investment planning
- Understand ethical considerations in investment and financial advice Apply investment knowledge to a given set of circumstance



General Insurance Revision Workshops

Grasp the essential areas of an exam syllabus to boost your existing knowledge.

IF1: Insurance, Legal and Regulatory

Description

This interactive workshop is designed to accelerate candidates' learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group.

Summary

 **Duration:** 1–2 day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the IF1 unit and require in-house preparation for the exam.

Learning Objectives/Workshop Benefits

The objective of Insurance, Legal and Regulatory (IF1) is to provide candidates with knowledge and understanding of the basic principles of insurance, including the main legal principles related to insurance contracts and insurance business, and the key elements to protect consumers.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

IF2: General Insurance Business

Description

This interactive workshop is designed to accelerate candidates learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group.

Summary

 **Duration:** 1–2 day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the IF2 unit and require in-house preparation for the exam.

Learning Objectives/Workshop Benefits

The objective of General Insurance Business (IF2) is to provide candidates with knowledge and understanding of insurance products and practice, including underwriting and policy wordings, claims, customer service and information and communication technology.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

IF3: Insurance Underwriting Process

Description

This interactive workshop is designed to accelerate candidates' learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group.

Summary

 **Duration:** 1–2 day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the IF3 unit and require in-house preparation for the exam.

Learning Objectives/Workshop Benefits

The objective of Insurance Underwriting Process (IF3) is to provide candidates with knowledge and understanding of the role of underwriting including identification, assessment and acceptance of risk, rating and relevant financial factors.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

IF4: Insurance Claims Handling Process

Description

This interactive workshop is designed to accelerate candidates' learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group.

Summary

 **Duration:** 1–2 day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the IF4 unit and require in-house preparation for the exam.

Learning Objectives/Workshop Benefits

The objective of Insurance Claims Handling Process (IF4) is to provide candidates with knowledge and understanding of the claims handling process including notification, assessment, settlement and associate financial factors.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

IF5: Motor Insurance Products

Description

This interactive workshop is designed to accelerate candidates' learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group.

Summary

 **Duration:** 1–2 day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the IF5 unit and require in-house preparation for the exam.

Learning Objectives/Workshop Benefits

The objective of Motor Insurance Products (IF5) is to provide candidates with knowledge and understanding of the practices and procedures connected with private motor, motorcycle and commercial motor insurance.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

IF6: Household Insurance Products

Description

This interactive workshop is designed to accelerate candidates learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group.

Summary

 **Duration:** 1–2 day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the IF6 unit and require in-house preparation for the exam.

Learning Objectives/Workshop Benefits

The objective of Household Insurance Products (IF6) is to provide an overview of the products, practices and procedures of household insurance and associated personal lines insurances in the UK.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

IF7: Healthcare Insurance Products

Description

This interactive workshop is designed to accelerate candidates' learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group.

Summary

 **Duration:** 1–2 day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the IF7 unit and require in-house preparation for the exam.

Learning Objectives/Workshop Benefits

The objective of Healthcare Insurance Products (IF7) is to provide knowledge and understanding of the fundamental principles and practices relating to healthcare insurance.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

IF8: Packaged Commercial Insurances

Description

This interactive workshop is designed to accelerate candidates' learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group.

Summary

 **Duration:** 1–2 day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the IF8 unit and require in-house preparation for the exam.

Learning Objectives/Workshop Benefits

The objective of Packaged Commercial Insurances (IF8) is to provide knowledge and understanding of the development and design of packaged commercial policies, scope of cover provided by the most common forms of packaged commercial policy, and arrangement and operation of packaged commercial insurance contracts.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

IF9: Customer Service in Insurance

Description

This interactive workshop is designed to accelerate candidates' learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group.

Summary



Duration: 1–2 day workshop



No of Attendees: 12–16



Format: Virtual delivery



CPD: Recognised

Who should attend

If your company has a group who are studying the IF9 unit and require in-house preparation for the exam.

Learning Objectives/Workshop Benefits

The objective of Customer Service in Insurance (IF9) is to provide knowledge and understanding of the customer service within the context of an insurance environment.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

I10 - Insurance Broking Fundamentals

Description

The objective of this online programme is to help you feel more prepared for your Insurance Broking Fundamentals (I10) exam.

Insurance Broking Fundamentals (I10) provides knowledge and understanding of the roles and responsibilities of insurance broking organisations, their interaction with insurers and clients, the regulatory environment in which they operate as well as both financial and conduct issues.

This programme will cover the key areas of the I10 syllabus, with time available to focus on particular areas as requested by participants during the session.

The programme is designed to be interactive and includes a variety of exercises and breakout opportunities to embed the knowledge learnt

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the I10 unit and require in-house preparation for the exam.

Learning Outcomes

During the workshop we will touch on the following areas of learning in their relation to learning outcomes:

- Chapter 1 – the Insurance Broking Market
- Chapter 2 – Role of the Broker in Meeting Client Needs
- Chapter 3 – Other Roles of Insurance Brokers
- Chapter 5 – Legal & Regulatory Issues
- Chapter 6 – Key Financial Issues Facing Insurance Brokers
- Chapter 7 – Conduct & Culture

We will also cover the structure of the exam, how best to approach the questions and study tips and hints.

Within the session, there will be advice provided on exam preparation and technique, and opportunities to practice examples of multiple-choice questions.

This is an intense revision workshop, ideal for students who are nearing the end of their studies and preparing for their examination.

Workshop objectives

By attending this workshop, delegates will cover:

- Key areas of the I10 syllabus
- Practice questions after each learning outcome
- Breakout exercises and discussions
- Exam preparation and revision tips
- Multiple choice question examples and answer explanations
- Access to a mock exam paper after the workshop

Within the session, there will be advice provided on exam preparation and technique, and opportunities to practice examples of multiple choice questions. This is an intense revision workshop, ideal for students who are nearing the end of their studies and preparing for their examination.

LM1: London Market Insurance Essentials

Description

This interactive workshop is designed to accelerate candidates' learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the LM1 unit and require in-house preparation for the exam.

Learning Objectives/Workshop Benefits

At the end of this workshop delegates should be able to:

- Understand basic terminology used within the general insurance market.
- Understand the fundamental principles of insurance.
- Understand the main classes of insurance written in the London Market.
- Understand the insurance cycle.
- Understand reinsurance within the insurance market.
- Understand the structure of the London Market.
- Understand the London Market's regulatory and legal environment.
- Understand the importance of appropriate systems and controls.
- Understand data protection and money laundering legislation and requirements.
- Understand the broker's role in the way that business is conducted in the London Market.
- Understand the underwriter's role in the way that business is conducted in the London Market.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

LM2: London Market Insurance Principles and Practices

Description

This interactive workshop is designed to accelerate candidates' learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the LM2 unit and require in-house preparation for the exam.

Learning Objectives/Workshop Benefits

At the end of this workshop delegates should be able to:

- Understand the business nature of the London Market.
- Understand the main classes of insurance written in the London Market.
- Understand reinsurance within the insurance market.
- Understand market security.
- Understand the regulatory and legal requirements applicable to the transaction of insurance business.
- Understand insurance intermediation in the London Market.
- Understand the underwriting function within the context of the London Market.
- Understand the way that business is conducted in the London Market.
- Understand the purpose, benefits and operation of delegated underwriting.
- Know the handling of claims in the London Market.
- Understand the main methods of resolving complaints.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

LM3: London Market Underwriting Principles

Description

This interactive workshop is designed to accelerate candidates' learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the LM3 unit and require in-house preparation for the exam.

Learning Objectives/Workshop Benefits

At the end of this workshop delegates should be able to:

- Understand the framework within which business is conducted in the London Market.
- Understand the role, purpose and implications of policy wording in practice.
- Understand the role and importance of business planning and capital setting in the London Market.
- Understand the pricing of risk at an individual and at a portfolio level.
- Understand the various methods of writing business and distribution.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

M05: Insurance Law

Description

This interactive workshop is designed to accelerate candidates learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group.

Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the M05 unit and require in-house preparation for the exam.

Learning Objectives/Workshop Benefits

The objectives of Insurance Law (M05) are to provide candidates with knowledge and understanding of the laws, which form the background to the operation of insurance, the system within which these laws operate and are administered, and apply knowledge and skills to practical situations.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

M21: Commercial Insurance Contract Wording

Description

This interactive workshop is designed to accelerate candidates learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group.

Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the M21 unit and require in-house preparation for the exam.

Learning Objectives/Workshop Benefits

The objective of Commercial Insurance Contract Wording (M21) is to develop knowledge and understanding of commercial (re)insurance contract wordings and the legal, regulatory and drafting issues surrounding these wordings.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

M80: Underwriting Practice

Description

This interactive workshop is designed to accelerate candidates learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the M80 unit and require in-house preparation for the exam.

Learning Objectives/Workshop Benefits

The objective of Underwriting Practice (M80) is to accelerate and develop the students' knowledge and understanding of the fundamental principles and practices of underwriting practice and the environment within which they operate.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

M85: Claims Practice

Description

This interactive workshop is designed to accelerate candidates learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the M85 unit and require in-house preparation for the exam.

Learning Objectives/Workshop Benefits

The objective of Claims Practice (M85) is to accelerate and develop the student's knowledge and understanding of the fundamental principles and practices of claims practice and how claims are handled.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

M92: Insurance Business and Finance

Description

This interactive workshop is designed to accelerate candidates learning towards an exam pass. The workshop provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision workshop can be tailored to the needs of your group.

Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

If your company has a group who are studying the M92 unit and require in-house preparation for the exam.

Learning Objectives/Workshop Benefits

The objective of Insurance Business and Finance (M92) is to provide candidates with knowledge and understanding of the fundamental principles and practices of insurance business and finance practice.

This revision workshop:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.



Technical Workshops

Refresh your existing knowledge or develop new skills.

Introduction to Aviation Insurance

Description

This comprehensive workshop is designed to equip prospective delegates with the essential knowledge and skills needed to navigate the complex world of aviation insurance. This workshop will provide you with a deep understanding of the unique risks, regulatory requirements, and coverage options associated with aviation.

Throughout this workshop, you will explore key topics such as underwriting principles, claims handling, risk management, and policy structures specific to aviation insurance. You will also gain insights into the operational and financial aspects of the aviation industry, enabling you to better assess and mitigate potential risks.

Get ready to take flight in your career with our Aviation Insurance Training Workshop!

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

Technical operations staff of insurance companies, insurance brokerage firms and reinsurance companies; Loss adjusters who play crucial roles in the insurance industry, Insurance managers of various organisations; Financial institutions: banks and other related entities; Airline staff; Clearing and forwarding agents Insurance regulators

Key Topics Covered

- Main Elements of Aviation Risk
- International Safety Conventions, Associations and Legislation
- Aviation Insurance Policy Wordings
- Risk Assessment and Underwriting
- Market Practices
- Aviation Claims
- Space Insurance

Learning Outcomes

By the end of the workshop delegates will be able to:

- Gain a basic understanding of the maritime and aviation insurance legal, economical, international trade environments as well as current trends
- Identify the risk factors relating to the various classes of marine and aviation insurance
- Acquire knowledge of the substantive areas of cover for each class
- Secure an understanding of the claims environment

Introduction to Business Interruption

Description

This interactive workshop is designed to develop knowledge and skills in this specialist topic. The workshop provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each workshop is typically one day, but this can be tailored to the needs of your group. This workshop is designed for brokers or underwriters that have some basic knowledge of property insurance. Using real case illustrations and exercises the training will address the key issues of BI, understanding the cover and ensuring it meets client needs.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

This workshop is designed for brokers or underwriters that have some basic knowledge of property insurance.

Learning Objectives

During the workshop, several exercises are undertaken (depending on the emphasis required) but will usually include:

- Calculating the gross profit sum insured.
- Factors that affect indemnity periods.
- Assessing limits for supplier's extensions.

Example wordings will be used throughout the workshop .

Learning Outcomes

By the end of the workshop delegates will be able to:

- Explain how to overcome the problems of handling this class of business.
- Explain in detail how a gross profit figure is arrived at from a set of accounts.
- Explain in detail the workings of the standard gross profit, revenue and fees policy covers and definitions and explain how they work in practice to enable delegates to select the most appropriate cover for their clients.
- Provide a detailed explanation of the difference between declaration linked and traditional (sum insured) methods of arriving at a gross profit figure and recognise the advantages and disadvantages of both.
- Outline how the COVID-19 business interruption litigation has impacted business interruption insurance.
- Explain in detail the main features of a business that will affect the setting of an appropriate maximum indemnity period.
- Describe the typical coverage extensions provided on a business interruption policy.
- Detail how a simple claim is settled and the role of the loss adjuster.
- Recognise the main features of a risk that will influence an underwriter in their assessment of acceptability and rating.

Introduction to Cargo Insurance

Description

International trade is inextricably linked to cargo insurance!

This **two half-day introductory workshop** introduces attendees to the world of international trade as well as to the insurance of shipments of cargo by sea and air.

Summary

 **Duration:** 2 half-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

Brokers, underwriters, importers and exporters, logistics professionals, solicitors, claims adjusters and surveyors who are new to cargo insurance or are seeking to update their technical knowledge

Learning Outcomes

By the end of the workshop, participants will be able to:

- Demonstrate knowledge of how international trade and finance works.
- Identify the basic legal and regulatory regimes governing international transportation of cargo.
- Describe the important provisions of the Marine Insurance Act, Insurance Act as well as the main principles and practices customary to the industry.
- Understand the principal areas of risk assessment in relation to a cargo policy.
- Identify the main benefits of cargo insurance.
- Explain the different types of cargo insurance coverage available as well as the principal coverages and exclusions.
- Identify the types of loss and how claims arise on cargo shipments.
- Describe the claims handling and adjusting process in relation to cargo insurance.

Introduction to Claims Handling

Description

These two half-day interactive online workshops will provide valuable background knowledge into claims handling.

Summary

 **Duration:** 1-day workshop or 2 half-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

The workshop has been designed for delegates with basic involvement in claims work and who wish to extend their knowledge. If delegates have no previous claims experience, then ideally, they should have some knowledge of insurance.

Learning Outcomes

At the end of this workshop you will have covered the basic principles of claims handling.

Key Topics Covered

Claims Principles

- Insurable interest
- Is it covered/proximate cause?
- Contribution
- Practical issues
- Subrogation
- Practical issues/investigation
- Indemnity
- Salvage
- Policy limitations
- Uninsured losses
- External resources

Conditions and warranties

- Non-disclosure
- Utmost good faith
- Good faith at the time of a claim

Fraud

- Definition
- Detection

Introduction to Commercial Packages

Description

This interactive workshop is designed to develop knowledge and skills in this specialist topic. The workshop provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each workshop is typically one day, but this can be tailored to the needs of your group. This workshop provides an overview of commercial packages. It offers a review of the way commercial insurance package business is provided to the market and administered.

Summary

 **Duration:** 1–2 day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

The workshop is ideal for those with less than twelve months experience of commercial insurance.

Learning Objectives

In this workshop we outline the risks small and medium-sized businesses face and then describe how commercial package insurance addresses those risk needs.

Learning Outcomes

By the end of the workshop delegates will be able to:

- Identify the key risks faced by a business and how the exposures will vary between different trades.
- Describe the coverage provided under commercial package and commercial combined policies.
- Explain the advantages and disadvantages of commercial package policies and commercial combined policies.
- Outline the key elements of commercial package coverage.
- Compare and contrast commercial packages aimed at different trades.
- Outline the underwriting considerations of commercial package insurance.

Introduction to Contract Works Insurance

Description

This interactive workshop is designed to develop knowledge and skills in this specialist topic. The workshop provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each workshop is typically one day, but this can be tailored to the needs of your group.

This workshop provides a useful introduction into contract works insurance and the way it is handled in the market.

Summary



Duration: 1–2 day workshop



No of Attendees: 12–16



Format: Virtual delivery



CPD: Recognised

Who should attend

This workshop provides training for those who already have an awareness of contract works insurance, but who wish to add to this knowledge.

Learning Outcomes

By the end of the workshop delegates will be able to:

- Describe the risks involved in contractors' insurance.
- Explain the difference between contractual obligations and insurance requirements.
- Describe how standard contracts such as the JCT clauses can affect the client's insurance arrangements.
- Describe the major elements of contract works insurance policies.
- Describe insurers' underwriting requirements.

Introduction to Construction Insurance

Description

This interactive workshop is designed to develop knowledge and skills in this specialist topic. The workshop provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each workshop is typically one day, but this can be tailored to the needs of your group. This workshop introduces the subjects of contract works, contractors' all risks and contractors' liability insurance.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

This workshop is suitable for those who are relatively new to the subject. No previous contract works experience is required, but a good grounding in the basics of construction insurance should still be regarded as a pre-requisite.

Learning Objectives

This workshop highlights an awareness of the standard structure, and content of contract works and contractors' liability insurance policies and the optional extras usually available and also demonstrate an awareness of the underwriting process and the information insurers require to assess and price risks.

Learning Outcomes

By the end of the workshop delegates will have an understanding of:

- Contract works insurance and the various ways cover is provided.
- The usual content of contract works and contractors' liability insurance policies and the usual optional extras.
- The insurance clauses within the JCT contract and the difference between contractual and insurance requirements.
- The underwriting and claims processes.

Introduction to Cyber Insurance

Description

In this 2 x half day introductory virtual workshop we provide an overview on Cyber insurance. We outline what cyber risks are and provide a range of claim examples.

We also discuss why cyber risks are not covered under traditional policies and the coverage provided by a stand alone cyber policy. We finish by outlining how best to sell cyber insurance to commercial customers.

Summary



Duration: 2 half-day workshop



No of Attendees: 12–16



Format: Virtual delivery



CPD: Recognised

Who should attend

Brokers and underwriters who are **new** to cyber insurance or seeking to consolidate and update their technical knowledge.

Learning Outcomes

On completion of the workshop, participants will be able to:

- Describe what is meant by cyber risk
- Explain how legal and regulatory developments impact cyber exposure
- Outline the coverage provided under a standalone cyber insurance policy
- Identify the benefits of cyber insurance
- Describe how cyber insurance dovetails with other non- cyber covers
- Explain the principal underwriting considerations of cyber policies including key elements of cybersecurity
- Identify the aggregation exposure faced by cyber insurers and reinsurers and outline how they are dealing with it
- Describe the process for handling cyber claims and potential areas of dispute

Introduction to Cyber Risks Insurance

Description

This interactive workshop is designed to develop knowledge and skills in this specialist topic. The workshop provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The Introduction to Cyber Risks Insurance workshop looks at the cyber risk limitations and exclusions for typical and traditional corporate insurance cover and the specialist cyber insurance solutions currently available.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

Those who have an understanding of the principle of insurance together with a grounding in property, business interruption, general liability and errors and omissions insurances.

Learning Objectives

The workshop takes a practical and thought-provoking look at:

- What are cyber risks – demystifying some terminology?
- What types of organisation are exposed to cyber risks?
- The cover provided by conventional insurance policies against cyber risks.
- The cover, conditions and exclusions of specialist cyber risks insurance policies in the UK – covering third-party and first-party costs.
- How cyber risks policies relate to other covers such as professional indemnity, business interruption and crime.
- Insurers' information requirements and underwriting considerations for cyber risks insurance.
- The main considerations when dealing with cyber risks insurance claims.

Learning Outcomes

By the end of the workshop delegates will be able to:

- Identify which types of customer could benefit from insurance against cyber risks.
- Consider why businesses do not buy cyber policies.
- Describe the extent of cover provided by conventional insurance policies against cyber risks.
- Describe the policy cover, conditions and exclusions of specialist cyber risks insurance policies in the UK.
- Outline the major risk, underwriting and rating considerations of cyber risks insurance.
- Outline the main considerations when dealing with cyber risks insurance claims.

Introduction to Data Science & AI for Insurance

Description

This introductory-level workshop is an important first step in developing your knowledge of data science and artificial intelligence (AI) within the context of insurance. It provides an overview of data tools and technologies and develops your understanding of data analysis, data visualisation techniques, an ethical approach to AI and data science techniques for insurance.

The Introduction to Data Science & AI for Insurance also provides opportunities to unlock business innovation through the use of data-driven insights and tools.

Data science is becoming an increasingly vital skill in many core insurance functions, including risk assessment and pricing, reserving, fraud detection, customer segmentation, customer experience, product development, reporting and communication.

This workshop is delivered by the Southampton Data Science Academy. This workshop programme was developed in partnership with the Chartered Insurance Institute.

Summary

 **Duration:** 30 hours

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

This workshop is ideal for anyone in the insurance profession seeking to develop an understanding of data science and AI capabilities – from broking, underwriting and claims professionals, to business analysts, product development, management and marketing roles.

Key Topics Covered

- Data Science, Data Management and Processing – introduces the concept and processes of data science, as well as what to do with data before you begin to extract insights.
- Data and Methods of Analysis for Insights Generation – focuses on data analysis approaches, including using statistics and machine learning techniques to extract insights.
- Data Visualisation and Communication – considers data visualisation, insights arising from visualisation techniques and ways particular data types can be displayed to highlight key findings.
- Further Analysis and Artificial Intelligence – explores the common artificial intelligence methods and how these can be applied in real-life insurance businesses to maximise data's potential.
- Application of Data Science Techniques in Insurance – focuses on considerations when carrying out a data science related project in an insurance context, including Professional Standards within the sector and some of the key issues with respect to Data Science.
- Ethical Implications and the Future – highlights some of the most important considerations in carrying out a data science related project, with an emphasis on ethics.

Learning Outcomes

On completion of the workshop, you will be able to:

- Explain core concepts and methods in data science and AI within insurance.
- Identify opportunities to apply data-science driven business solutions.
- Gather, process, analyse, visualise and communicate insight from novel, large and heterogeneous datasets.
- Perform basic analysis of relevant datasets with state-of-the-art tools and technologies in the insurance context.
- Provide insights about the legal, ethical and technical implications of using big data and AI in an insurance context.

Introduction to Directors' and Officers' Liability Insurance

Description

This interactive workshop is designed to develop knowledge and skills in this specialist topic. The workshop provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each workshop is typically one day, but this can be tailored to the needs of your group. This workshop focuses on who directors and officers are and their principle duties. The workshop introduces delegates to the benefits of directors' and officers' insurance and the coverage afforded and brings them up to date with recent changes in the law.

Summary

 **Duration:** 1 half-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

This interactive workshop is suitable for delegates who are new to directors' and officers' liability insurance.

Learning Objectives

In this workshop, we cover the following topics:

- Directors' and officers' liabilities.
- Recent claim examples.
- Recent changes in case law, company law and other legislation.
- Policy coverage.
- Underwriting considerations.
- Claims management.

Learning Outcomes

By the end of the workshop delegates will be able to:

- Explain why directors and their organisations need directors' and officers' liability or management liability coverage.
- Explain how the legal exposures of directors and companies are evolving.
- Use relevant claim examples to demonstrate the need for directors' and officers' liability or management liability insurance.
- Identify which clients who have greatest need for directors' and officers' liability or management liability insurance.
- Explain the major benefits of a directors' and officers' liability or management liability insurance.
- Describe the policy coverage provided under directors' and officers' liability or management liability policies.
- Identify the underwriting considerations for directors' and officers' liability or management liability insurance.
- Outline how insurers handle directors' and officers' liability or management liability insurance claims.
- Explain current developments in the directors' and officers' liability or management liability insurance market.

Introduction to Employment Practices Liability Insurance

Description

This interactive workshop is designed to develop knowledge and skills in this specialist topic. The workshop provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each workshop is typically one day, but this can be tailored to the needs of your group. An ideal introduction to the subject of employment practices liability insurance

Summary

 **Duration:** 1–2 day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

This workshop has been designed for delegates with an interest in knowing about employment practices liability, its associated risks and the methods of providing appropriate insurance cover.

Learning Objectives

In this workshop, we cover the following topics:

- Background to employment practices liability insurance.
- Changes in employment law.
- Relevant employment relations acts.
- Employees' increasing rights.
- Discrimination.
- Minimum Wage Directive.
- Human Rights Act 2000.
- Data Protection Act.
- Employment practices liability insurance and the buyer.

Learning Outcomes

By the end of the workshop delegates will be able to:

- Explain why organisations need employment practices liability coverage.
- Outline how changes in legislation have impacted the exposure of organisations to employment practices claims.
- Use relevant claim examples to demonstrate the need for employment practices liability insurance.
- Explain the major benefits of employment practices liability insurance.
- Describe the policy coverage provided under an employment practices liability policy.
- Identify the differences between employment practices liability policy coverage and commercial legal expenses insurance which also covers employment disputes.
- Describe the underwriting considerations for directors' and officers' liability and management liability insurance.
- Outline how insurers handle employment practices liability insurance claims.
- Explain current developments in the employment practices liability insurance market.

Introduction to Energy Insurance

Description

The energy industry is involved in the extraction, production, refining, and distribution of energy sources, including oil, gas and secondary sources such as electricity.

This two half-day introductory workshop provides an outline of the downstream midstream, upstream and renewable energy industries as well as the corresponding insurance marketplace, with emphasis on the London energy insurance market. It introduces attendees to the regulatory and legal framework in which the energy sector operates.

The workshop will then highlight risk profiles such as fixed platforms and mobile drilling units as well as land-based risks. The workshop will then include a final discussion on insurance coverages and common energy forms with a brief section on energy claims handling practices

Summary

 **Duration:** 2 half-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

Brokers, risk managers, underwriters, shipowners and managers, logistics professionals, solicitors, claims adjusters and surveyors

Learning Outcomes

By the end of the workshop, participants will be able to:

- Demonstrate a basic understanding of the energy industry and its main sub-sectors.
- Understand the legal and regulatory framework in which the energy industry operates.
- Identify the main risk profiles associated with the energy sector.
- Understand the energy insurance industry.
- Explain the corresponding insurance coverages as well as standard energy insurance forms.
- Identify the key elements of the energy claims process.

Introduction to Farming Insurance

Description

This one-day online interactive workshop is designed to introduce delegates to the major covers found in a farming combined policy. It discusses the nature of farm buildings and machinery and explores the range of cover available.

The most appropriate way of arranging Business Interruption cover will be explored, including a calculation to determine the correct sum insured. Liability issues will be discussed, including reference to important case law, and cover for livestock diseases will be explained. A session on Engineering risks is also included, and delegates will have the opportunity to discuss any other covers of interest (e.g. Hail, PA, Cattle Passport, etc.)

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

This workshop is aimed at brokers already handling commercial insurances, or anyone who wishes to gain a basic understanding of the needs of farmers and the main features of farming insurances. Participants will gain an understanding of how insurers underwrite the key sections of a farming combined policy

Learning Outcomes

By the end of the workshop, participants will have covered:

- Identify & understand the different types of Farms & associated activities
- Become familiar with common farming buildings machinery & produce
- Explore the Property underwriting issues & cover available
- Discuss an appropriate way of arranging BI cover and to calculate a sum insured
- Discuss the cover available for livestock, including animal diseases and sheep worrying
- Gain an understanding of liability issues
- Identify Engineering inspection and insurance risks

Evaluation of understanding

- Open forum question and answer session
- Scenario analysis
- Feedback

Introduction to General Insurance

Description

This interactive workshop is designed to develop knowledge and skills in this specialist topic. The workshop provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each workshop is typically one day, but this can be tailored to the needs of your group. This workshop will provide participants with an overview of the types of general insurance sold in the UK and around the world and how they are distributed and priced.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

Any new entrant to the insurance or reinsurance industry working directly in the market or in a supporting area.

Learning Objectives

The workshop takes a practical and thought-provoking look at:

- Consumer insurances
- Commercial insurances
- Consumer v. commercial insurance
- General commercial
- Speciality
- The underwriting process
- The claims process
- The future

Learning Outcomes

By the end of the workshop delegates will be able to:

- Outline the main classes of general insurance.
- Explain how general insurance is underwritten and sold.
- Identify the underwriting considerations of the principal general insurances.
- Explain how claims are handled under the main types of general insurance.

Introduction to Hull and Machinery and P & I Insurance

Description

Hull and machinery and protection and indemnity (P & I) insurance is all about insuring the smallest fishing vessel or tug operating in inland or coastal waters to insuring a fleet of ocean-going oil tankers or multi deck passenger vessels along with their corresponding marine liabilities.

This **two half-day introductory workshop** introduces attendees to the regulatory and legal framework, the 'rules' of the sea as well as the key risk profiles pertaining to the different types of vessel. The workshop then identifies the main hull insurance and P and I markets as well as the types of insurance coverage available. Specific focus and attention will be directed towards London market practices and wordings.

The workshop closes with an explanation of the claims handling and adjusting process for both hull and P & I claims, that is so unique to the commercial hull class of business.

Summary

 **Duration:** 2 half-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

Brokers, underwriters, shipowners and managers, logistics professionals, solicitors, claims adjusters and surveyors who are new to marine insurance or are seeking to update their technical knowledge.

Learning Outcomes

By the end of the workshop, participants will be able to:

- Demonstrate a basic understanding of the legal and regulatory framework to hull and machinery and P & I insurance.
- Identify the main hull and machinery and P & I markets.
- Understand the basic hull and machinery insurance and P & I coverages that are available.
- Identify the types of vessel as well as the corresponding risk profiles.
- Understand the underwriting process
- Identify the types of loss.
- Explain the claims handling and adjusting process

Introduction to Insurance

Description

This interactive workshop is designed to develop knowledge and skills in this specialist topic. The workshop provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each workshop is typically one day, but this can be tailored to the needs of your group. This workshop provides an overview of the basic principles of insurance and an introduction to insurance practice.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

Any new entrant to the insurance or reinsurance industry working directly in the market or in a supporting area.

Learning Objectives

The workshop takes a practical and thought-provoking look at:

- The basic principles of insurance.
- Terminology.
- Policy structure.
- The key forms of insurance.
- Reinsurance and its purpose.

Learning Outcomes

By the end of this workshop delegates will have gained an excellent grounding in insurance principles and practice.

Introduction to Insurance Broking

Description

In this 2x half-day virtual workshop, we provide an overview of the role of retail and wholesale brokers in the insurance market and the key skills that are required to become a successful broker.

Summary

 **Duration:** 2 half-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

Brokers who are new to broking or are seeking to improve their broking skills.

Learning Outcomes

By the end of the workshop, participants will be able to:

- Explain the role of a broker (including retail, wholesale and reinsurance brokers)
- Describe how the law of agency dictates broker's responsibilities to their customers and sometimes other brokers and insurers
- Outline how brokers are regulated in the UK
- Identify the key skills required of a successful broker
- Explain how brokers market to and target clients and build relationships
- Explain how retail brokers identify and assess the coverage needs of their customers
- Explain the broker's role in the insurance market and how they negotiate the best price and coverage for their customers
- Describe the broker's role in ensuring the claims process works smoothly and clients recover claims monies
- Identify the common causes of complaints and errors and omissions claims against brokers and how brokers can seek to minimise complaints and errors and omissions claims
- Develop an action plan to improve their broking skills

Introduction to Insurance Contract Law

Description

This interactive workshop is designed to develop knowledge and skills in this specialist topic. The workshop provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. This introductory level workshop is designed to develop delegates knowledge and understanding of the principles and practices of insurance and insurance contract law.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

All insurance staff, from brokers or other intermediaries, through to those involved in underwriting, claims, insurance programme design or placement, risk managers, sales or administration. Also lawyers and other professionals whose work brings them into contact with the business of insurance.

Learning Objectives

The workshop takes a practical and thought-provoking look at:

- General principles of contract law.
- Legal principles governing the formation of insurance contracts:
 - the doctrine of insurable interest; and
 - the doctrine of utmost good faith: misrepresentation and the duty of disclosure in relation to insurance.
- Warranties, conditions and other terms of insurance contracts.
- Void and illegal insurances.
- Making an insurance claim – legal rules governing notice and proof of loss.
- Construction (interpretation) of insurance contracts, including statutory and common law rules.
- The doctrine of proximate cause.
- Measuring the loss – the principle of indemnity.
- The doctrines of subrogation and contribution.
- Exercise and case studies.

Learning Outcomes

At the end of this workshop delegates will be able to:

- Explain the general principles of contract and business law as they apply to insurance.
- Outline the special principles of insurance contract law.
- Define the legal rules that affect particular classes of insurance, including marine insurances and the compulsory classes (EL and motor in the UK).

Emphasis is placed on English law but, where appropriate, comparison with US, continental and other legal systems is made.

Introduction to Insurance and the London Insurance Market

Description

This interactive workshop is designed to develop knowledge and skills in this specialist topic. The duration of each workshop is typically one day, but this can be tailored to the needs of your group. The workshop will provide an insight into insurance and the insurance market, including a brief history, an overview of the market place, the role of the participants, its processes and procedures. The workshop will contain a range of exercises and games to explain and help the participants understand insurance and the insurance market.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

Ideal for any new entrant to insurance and the Lloyd's syndicate, broker, insurer, reinsurer, accountant or loss adjuster, to enable them to understand the London Market and current market practice.

Learning Objectives

The workshop takes a practical and thought-provoking look at:

- The basic principles of insurance: terminology, policy structure and the key forms of insurance.
- Reinsurance and its purpose.
- The development of the London Market,
- The who, what and why of Lloyd's,
- The role of the broker including ethical consideration,
- The international nature of London – current issues and trends in the London Market.

Learning Outcomes

By the end of the workshop delegates will be able to:

- Explain the purpose and benefits of insurance.
- Outline the key principles of insurance.
- Identify the types of insurance and reinsurance.
- Explain the role of the insurance market participants.
- Describe the strengths of Lloyd's and the London Market.
- Describe the placing and claims processes in Lloyd's and the insurance market.
- Outline planned and possible future developments within the insurance market.

Introduction to Jewellers, Fine Arts and Species Insurance

Description

Jewellers' block is a form of commercial insurance cover designed to address those risks faced by firms who either manufacture, transport or sell items of jewellery including precious gemstones.

The definition of fine art as to what can be insured under a policy named as such can be extremely wide-ranging.

'An artist is somebody who produces things that people don't need to have.' – Andy Warhol.

Specie insurance relates to the cover for items that would traditionally have been limited to bank notes and coins, but this cover now applies to items of high value in relation to this size (for example, watches or a quantity of gold bullion).

Summary

 **Duration:** 2 half-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

Brokers/underwriters new to this class of insurance business or those wishing to build upon or refresh their knowledge of the subject.

Key Topics Covered

- Defining fine art and specie
- Describing the various types of firms who may seek cover in these classes of insurance business
- Consideration of the core cover for jewellery, specie, fine art, and various extensions found in the fine art policy including commonly encountered limitations and exclusions
- Risk management measures and limiting exposure
- Consideration of different methods of claim settlement used by insurers
- Insurance of large risks – co-insurance/reinsurance

The workshop is highly interactive including case studies that can be used for group exercises.

Learning Outcomes

Upon completion of this workshop delegates will be able to:

- Describe the different type of firm or individual who may seek these classes of insurance business.
- Be aware of the relevant risk management measures used by the owners of valuable items
- Understand the rating factors appropriate to the thorough assessment of risks associated with valuable items.
- Be fully aware of the extent of cover provided by the policy insuring valuable items (both commercial and personal lines)

Introduction to Liability Insurance

Description

This interactive workshop is designed to develop knowledge and skills in this specialist topic. The workshop provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each workshop is typically one day, but this can be tailored to the needs of your group. This workshop is designed to put liability insurance into context and to introduce the delegates to the operation and principles of liability insurance.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

All insurance staff, from brokers or other intermediaries, through to those involved in underwriting, claims, insurance programme design or placement, risk managers, sales or administration. Also lawyers and other professionals whose work brings them into contact with the business of insurance.

Learning Objectives

The workshop takes a practical and thought-provoking look at:

- What is liability?
- How liability arises, including common law, statute and contract.
- Types of liability cover, exclusions and conditions for each.
- Employers' Liability Compulsory Insurance Act.
- Limits of liability.
- Risk assessment and pricing.
- USA exposures.
- Industrial diseases.
- Risk management and health and safety legislation.
- Claims handling, the litigation process and current practices.

Learning Outcomes

By the end of the workshop delegates will have:

- A valuable overview of liability insurance.
- An understanding of the different types of liability insurance available.
- A valuable overview of risk assessment and pricing, risk management and claims handling.

Introduction to Life Insurance

Description

This interactive workshop is designed to develop knowledge and skills in this specialist topic. The workshop provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each workshop is typically one day, but this can be tailored to the needs of your group. This workshop will provide participants with an overview of the types of life and long-term insurance sold in the UK and around the world and how they are distributed and priced.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

Insurance staff, from brokers or other intermediaries, through to those involved in underwriting, claims, insurance programme design or placement, risk managers, sales or administration.

Learning Objectives

The workshop takes a practical and thought-provoking look at:

- Long-term insurance market.
- Regulation.
- Distribution.
- Customer needs.
- Scope of cover.
- Types of products and their use.
- Underwriting and risk assessment.
- Claims administration.

Learning Outcomes

By the end of the workshop delegates will be able to:

- Describe the main features of the UK long-term insurance market.
- Identify the main types of life and long-term insurance sold.
- Describe how life insurance products are priced and distributed.

Introduction to Lloyd's and the London Market

Description

This interactive workshop is designed to develop knowledge and skills in this specialist topic. The workshop provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each workshop is typically one day, but this can be tailored to the needs of your group. This workshop provides an overview of the development of the London Market necessary to understand current practice. The session will give an insight into the key issues facing the London Market today and in the future.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

Ideal for any new entrant to a Lloyd's syndicate, broker, insurer, reinsurer, accountant or loss adjuster, to enable them to understand the London Market and current market practice.

Learning Objectives

The workshop takes a practical and thought-provoking look at:

- The development of the London Market.
- The who, what and why of Lloyd's.
- International Underwriting Association.
- The role of the broker including ethical considerations.
- The international nature of London – current issues and trends in the London Market.
- The future, including electronic trading/support.

Learning Outcomes

By the end of the workshop delegates will have:

- Gained a brief but comprehensive view of the London Market and its future role.
- Built foundation knowledge of the London Market.

Introduction to Marine Claims

Description

Marine claims can be broken down into the three main areas of marine insurance: Cargo, hull and protection and indemnity insurance, and marine liabilities.

This two half-day introductory workshop introduces attendees to the regulatory and legal framework in which the marine claims process operates along with a review of time honoured claims adjusting practices. The workshop identifies the main types of marine losses and offers attendees insight into General Average, salvage, collision and sue and labor losses along with common types of cargo loss. The workshop will also address investigation of marine losses, the role of the marine survey as well as an explanation of the types of documentation required to support a marine claim.

Summary

 **Duration:** 2 half-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

Brokers, underwriters, shipowners and managers, logistics professionals, solicitors, claims adjusters and surveyors who are new to marine insurance or are seeking to update their technical knowledge.

Learning Outcomes

By the end of the workshop, participants will be able to:

- Demonstrate a basic understanding of the legal and regulatory framework in which claims are handled, investigated and adjusted.
- Identify the main types of marine loss.
- Understand the basic principles and practices for adjusting marine claims.
- Explain the main types of transportation along with the hazards associated with navigation on the High Seas and the corresponding liabilities.
- Identify the roles of each party involved in the transportation and claims process.
- Understand the types of documents associated with marine claims.

Introduction to Marine Insurance

Description

Marine insurance has a very important role to play in the field of international commerce and trade. This two half-day introductory workshop introduces attendees to the 4 main classes of marine insurance: Cargo, Hull and Machinery, Marine Trade Liabilities and Protection and Indemnity (P and I).

Summary

 **Duration:** 2 half-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

Brokers, underwriters, importers and exporters, logistics professionals, solicitors, claims adjusters and surveyors who are new to marine insurance or are seeking to update their technical knowledge.

Learning Outcomes

By the end of the workshop, participants will be able to:

- Demonstrate a basic understanding of the four main classes of marine insurance.
- Identify the basic, both UK and international, legal and regulatory regimes governing marine insurance.
- Understand the structure of the company, Lloyd's and international markets.
- Explain the main differences between the fixed premium P and I market, on the one hand, and the structure and functionality of the international P and I Clubs, on the other.
- Identify the risk management factors relating to the four main classes of marine insurance.
- Explain the main headings of coverage relating to each of the four classes of marine insurance.
- Understand the principal standard exclusions relating to each of the four classes of marine insurance.
- Identify the main categories of losses pertaining to each class of marine insurance.
- Explain the main principles and practices relating to the handling of marine claims.

Introduction to Marine Liability Insurance

Description

A key sector of the maritime and transportation industry is its complex legal and regulatory framework in general and the individual liabilities of shipowner, service providers and transport intermediaries in particular.

This **two-half day introductory workshop** will address the very different but related liability regimes governing a) Shipowners and charterers b) Marine trade and marine service providers such as port operators, stevedores, ship repairers and marina operators and c) Transport intermediaries such as freight forwarders, load brokers, customs brokers and warehouse operators.

The workshop will then focus on the risk profiles of each group, followed by a discussion on the various insurance coverages available

Summary

 **Duration:** 2 half-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

Brokers, risk managers, underwriters, shipowners and managers, logistics professionals, solicitors, claims adjusters and surveyors.

Learning Outcomes

By the end of the workshop, participants will be able to:

- Demonstrate a basic understanding of the legal regimes governing the maritime and transportation industry.
- Identify the principal risk profiles of each industry 'player'.
- Explain the corresponding insurance coverages that are available to respond to each sector of the industry.
- Understand the key elements of the claims handling framework and processes.

Introduction to Mortgage Advice

Description

In this two half-days virtual workshop, we provide an overview and an update on Mortgage Advice.

Summary

 **Duration:** 2 half-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

Brokers, risk managers, underwriters, shipowners and managers, logistics professionals, solicitors, claims adjusters and surveyors.

Learning Outcomes

By the end of the workshop, participants will be able to:

- Describe what a mortgage is and how they are created.
- Identify the varying types of mortgage available
- Compare the different ways mortgages are sold
- Identify the key job roles in mortgages
- Describe the house buying process
- Identify the responsibilities of surveyors
- Describe the legal aspects of property ownership
- Identify the key legal aspects of buying and selling a home and the role of the conveyancer
- Compare the role of the mortgage underwriter with the adviser and outline the regulatory responsibilities with their position.
- Review the future of the mortgage industry in the UK

Introduction to Mortgage Broking

Description

This one full-day interactive workshop is designed to provide participants with a thorough understanding of the mortgage broking industry.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

Whether you're new to the banking sector, a customer service representative, an underwriter, or an aspiring broker, this workshop will equip you with the essential knowledge and practical skills to excel in the dynamic world of mortgage broking.

Key Topics Covered

Introduction to Mortgage Broking

- Overview of the mortgage broking industry.
- The role and responsibilities of a mortgage broker.
- Key players in the mortgage process (lenders, clients, underwriters).

Understanding Mortgage Products and Markets

- A comprehensive look at different mortgage products
- Analysing market trends and understanding the competitive landscape.
- Interactive mortgage calculator demonstration.

The Mortgage Broking Process

- Step-by-step guide through the mortgage broking process.
- Gathering and analysing client information.
- Case study: Simulating a client interaction and presenting mortgage options.

Regulatory Framework and Compliance in Broking

- Overview of essential regulatory requirements for mortgage brokers (FCA regulations, MCOB rules).
- Compliance best practices and the importance of ethical broking.
- Case study: Compliance challenges and how to navigate them.

Mortgage Underwriting for Brokers

- Insights into the underwriting process from a broker's perspective.
- Collaboration between brokers and underwriters.
- Practical strategies for overcoming underwriting challenges.
- Interactive case study: Underwriting scenarios and decision-making.

Technology and Tools for Mortgage Brokers

- Introduction to essential tools for brokers: mortgage sourcing systems, CRM platforms, etc.
- Video demonstrations of crucial technology tools in action.
- Tips for leveraging technology to streamline your broking process.

Career Development in Mortgage Broking

- Exploring career pathways within the mortgage broking industry.

- Guidance on pursuing further qualifications and certifications.
- Resources for continuous professional growth.

Learning Outcomes

By the end of the workshop, participants will be able to:

- Understand the role of a mortgage broker within the financial services industry.
- Learn to identify various mortgage products and determine their suitability for different client profiles.
- Develop a step-by-step understanding of the mortgage broking process from initial client inquiry to deal closure.
- Acquire skills to gather, analyse, and assess client information to recommend appropriate mortgage solutions.
- Understand the regulatory requirements and compliance obligations that govern mortgage broking including FCA regulations and MCOB rules.
- Gain insights into the underwriting process and learn how to effectively collaborate with underwriters to secure mortgage approvals.
- Become proficient in using essential tools and technology platforms that streamline the mortgage broking process such as mortgage sourcing systems and CRM software.
- Learn the importance of ethical practices in mortgage broking and how to balance client interests with regulatory compliance.
- Identify potential career paths within the mortgage broking industry and understand the steps required to advance your professional development.

Introduction to Motor Fleet Insurance

Description

This interactive workshop is designed to develop knowledge and skills in this specialist topic. The session provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each workshop is typically one day, but this can be tailored to the needs of your group. In this workshop we provide an overview and an update on motor fleet insurance from a broking perspective.

Summary

 **Duration:** 1 half-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

Those with hands-on experience of insurance who wish to gain a better understanding of motor fleet insurance.

Learning Objectives

The workshop takes a practical and thought-provoking look at:

- Legal developments that have impacted motor fleet insurance.
- Typical coverage provided under a motor fleet insurance.
- Motor fleet claims.
- Pricing of motor fleet.

Learning Outcomes

By the end of the workshop delegates will be able to:

- Outline recent legal developments that have impacted motor fleet insurance.
- Explain the typical coverage provided under a motor fleet insurance.
- Describe what aspects impact the pricing of a motor fleet risk.
- Identify where motor fleet rating will help a customer.
- Describe how motor fleet claims can be handled efficiently utilising technology.
- Explain the measures motor fleet managers can take to reduce their risks and improve their claims experience.

Introduction to Motor Trade Insurance

Description

This workshop is designed to develop knowledge and skills in this specialist topic. The session provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each workshop is typically one day, but this can be tailored to the needs of your group. In this workshop we provide an overview and an update on motor trade insurance from a broking perspective.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

This workshop has been designed for delegates with no previous involvement in motor trade insurance.

Learning Objectives

The workshop takes a practical and thought-provoking look at:

- Primary risks associated with motor trade businesses.
- An examination of the reasons why a motor trader needs a special type of motor insurance policy.
- A review of the law relating to motor insurance with particular reference to the Motor Insurance Database.
- Policy wordings and conditions and exclusions.
- Popular policy extensions.
- How the different types of motor trade insurance are rated and an examination of the relevant underwriting factor.

Learning Outcomes

By the end of the workshop delegates will be able to:

- Describe the types of commercial vehicles and the risks associated with each.
- Identify the key risks associated with motor trade businesses.
- Describe the main aspects of motor trade insurance.
- Explain the structure and usual content of insurance policy wordings, including popular extensions.
- State how the Motor Insurance Database impacts on motor trade businesses.
- Explain a motor trader's obligations under the Motor Insurance Database.
- Outline the key underwriting and rating considerations for motor trade insurance.

Introduction to Personal Injury Claims

Description

The aim of this half day workshop is to provide an overview of personal injury claims, including investigating and valuing claims, the litigation process and discussion of current issues.

The workshop assumes that liability is not at issue and concentrates solely on quantum.

The workshop will include plenty of opportunity for discussion and relevant case studies and exercises.

Summary

 **Duration:** 1 half-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

It will be relevant to those seeking to develop their knowledge of liability and motor claims.

Key Topics Covered

- An overview of the claims process as it relates to personal injury claims

Quantum (the amount of the claim)

- Heads of claim
- Reserving
- Investigating quantum
- Valuing the claim
- The role of rehabilitation

Negotiation

- Negotiating legal liability and quantum

Introduction to Personal Insurances

Description

This one-day workshop provides an overview of the personal insurance market. The training presented is in an interactive style, with activities to help reinforce learning. Delegate participation is encouraged.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

This training is ideal for anyone who is new to the insurance industry or administrative staff working directly in the market or supporting areas.

Learning Objectives

The workshop takes a practical and thought-provoking look at:

- The personal lines market and developments.
- Private motor insurance – levels of cover.
- Household insurance, main types of cover, optional extensions and exclusions.
- Travel insurance, types of cover, optional extensions and exclusions.
- Claims procedures.
- Consumer disputes and the impact of fraud.

Learning Outcomes

By the end of the workshop delegates will be able to:

- Build a foundation knowledge of the core personal insurance products.
- Appreciate the scope of cover, for private motor, household and travel insurance products.
- Be aware of the impact of fraud and the insurance sector's steps to combat fraud.

Introduction to Professional Indemnity Insurance

Description

This interactive workshop is designed to develop knowledge and skills in this specialist topic. The workshop provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each workshop is typically one day, but this can be tailored to the needs of your group. This workshop provides an overview and an update of professional indemnity insurance from a broking perspective.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

All insurance staff, from brokers or other intermediaries, through to those involved in underwriting, claims, insurance programme design or placement, risk managers, sales or administration. Also lawyers and other professionals whose work brings them into contact with the business of insurance.

Learning Objectives

The workshop takes a practical and thought-provoking look at:

- The duty of care owed by professionals – legal liability and breach of contract.
- Examples of professional negligence claims.
- Professional indemnity and errors and omissions policy.
- Key elements of cover.
- The proposal and underwriting process – how an underwriter uses the details provided to rate the risk.
- The claims process, including incident reporting and PI protocols.

Learning Outcomes

By the end of the workshop delegates will be able to:

- Describe what types of organisations have a professional liability exposure and require professional indemnity insurance.
- Outline recent examples of professional indemnity claims.
- Describe the principal reasons why professionals or service companies should buy professional indemnity insurance.
- Explain the coverage provided by a professional indemnity insurance policy.
- Explain how professional indemnity coverage fits with other liability coverages and identify areas where there may be an overlap in cover.
- Outline the principal underwriting and pricing considerations that apply to professional indemnity insurance.
- Outline recent changes in the professional indemnity insurance market.
- Explain the important points to remember when dealing with a professional indemnity claim.

Introduction to Reinsurance

Description

This workshop covers the key elements of reinsurance methods and practices, including the application of facultative and treaty business and the considerations made when transacting reinsurance and underwriting and purchasing proportional and non-proportional treaties. Reinsurance is examined from the viewpoint of both the reinsurer and the reinsured.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

New entrants to the insurance or reinsurance industry working directly in the market or supporting area.

Learning Objectives

The workshop takes a practical and thought-provoking look at:

- Benefits of reinsurance.
- Reinsurance market key players.
- Uses of facultative and treaty reinsurance.
- Application of proportional reinsurance.
- Quota share.
- Surplus.
- Application of non-proportional reinsurance.
- Excess of loss.
- Stop loss/aggregate excess of loss.
- Reinsurance programme design.
- Reinsurance underwriting.
- Operation of reinsurance contracts including claims.
- Alternative risk transfer.

Learning Outcomes

By the end of the workshop the delegates will be able to:

- Describe how insurers use facultative and treaty reinsurance to protect themselves and increase their capacity.
- Identify the key players in the reinsurance market.
- Explain how proportional reinsurances operate.
- Explain how non-proportional reinsurance operate.
- Identify the key elements of reinsurance programme design.
- Describe how insurers and their reinsurers can work effectively with each other.
- Outline how alternative risk transfer methods can be used to protect insurers and reinsurers.

Introduction to the US Insurance Market

Description

This 6 hour interactive workshop is intended to introduce attendees to the American insurance market and includes: An outline of the American Property and Casualty and Life insurance markets, lines of business, underwriting, coverages, claims, regulatory and licensing

Summary

 **Duration:** 2 half-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

Underwriters, brokers, adjusters, service companies and any entity planning to do business in the USA.

Learning Outcomes

By the end of the workshop, participants will have covered:

1. Classes of business

- Property and casualty
- Personal v commercial Life, accident and sickness
- Specialty Classes:
- Marine, aviation, energy, cyber

US Insurance Market:

- Statistics Insurers (including roles within an insurance office)
- Reinsurers Agents and intermediaries
- Market associations and groups
- Mergers and acquisitions
- Major differences between other world insurance markets
- What distinguishes the US market from the London Market?

Property and Casualty policy language

- Schedule Standard forms
- Standard exclusions
- Limits and aggregate limits
- Occurrence versus claims made
- Sanctions and financial crime

Life Insurance

- Basic principles and types of policy

Claims: Handling, investigation and settlement process

- Main players in the claims field
- Coverage and liability disputes:
- Reservation of rights
- Common terms and procedures
- Catastrophic losses

Legal and Regulatory: State and Federal

- Admitted and surplus lines
- US system of Law: Federal and State
- How is insurance regulated in the USA?
- Compliance Sanctions

Measuring the Performance of a US insurance Company

- Commissions and expenses
- Technical and free reserves and other liabilities

Introduction to Underwriting

Description

This one full-day online workshop provides an introduction to the subject of insurance underwriting. The workshop focuses upon the practical ways in which underwriters help to mitigate risks and the underwriting measures employed on policies to manage exposure

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

The workshop is suitable for anyone who needs an understanding of the principles of underwriting and assumes no prior knowledge. It is also relevant for anyone who works in underwriting or broking who needs knowledge of the subject.

Learning Outcomes

Workshop Objectives

- To understand the nature of risk and the means used to manage those risks
- To be aware of the types of information required by underwriters to enable risk assessment
- Understand the basic principles of insurance pricing of a risk
- Describe the measures available to insurers to control their exposure to claims including reinsurance
- Describe the concept of accumulation of risk and how this can be controlled
- Understand why surveys can be required and the nature of information that the surveyor would seek

Workshop Content

- Defining risk management and the means available to deal with risks faced by individuals and organisations
- Risk assessment and the nature of information required by insurers to undertake the process
- The concept of "Utmost Good Faith" and why it is so important in an insurance contract
- The impact of The Insurance Act 2015 upon the risk assessment process
- The approach to providing cover including an overview of the fundamentals of the policy (including conditions, endorsements and warranties)
- The considerations and process of risk pricing

The workshop will be undertaken by means of a number of exercises and case studies.

Intermediate Business Interruption Insurance

Description

This interactive workshop is designed to develop knowledge and skills in this specialist topic. The workshop provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each workshop is typically one day, but this can be tailored to the needs of your group. This one-day interactive workshop provides participants with an opportunity to explore business interruption insurance in more depth than the introduction-level workshop.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

This one-day interactive workshop is suitable for delegates who have had a hands-on experience with this class of business for a minimum of two years.

Learning Objectives

The workshop takes a practical and thought-provoking look at:

- Typical customer attitudes shown to business interruption insurance and the role of the broker in overcoming problems arising from these.
- A comprehensive review of gross profit cover, including the other main covers (revenue, fees, increased cost of working, additional increased cost of working).
- Setting an estimate or sum insured from a set of accounts and projecting this using both declaration linked and traditional methods.
- Features that have a bearing on the setting of the maximum indemnity period and how these can affect the underwriter's assessment of EML.
- Risk assessment and rating influenced by the information obtained from the client.
- Business interruption extensions commonly requested.
- Calculating a simple business interruption claim.

Learning Outcomes

By the end of the workshop delegates will be able to:

- Explain how to overcome the problems of handling this class of business.
- State in detail how a gross profit figure is arrived at from a set of accounts.
- Explain in detail the workings of the standard gross profit, revenue and fees policy covers and definitions and explain how they work in practice to enable delegates to select the most appropriate cover for their clients.
- Provide a detailed explanation of the difference between declaration linked and traditional (sum insured) methods of arriving at a gross profit figure and recognise the advantages and disadvantages of both.
- Explain in detail the main features of a business that will affect the setting of an appropriate maximum indemnity period.
- Detail how a simple claim is settled and the role of the loss adjuster.
- Recognise the main features of a risk that will influence an underwriter in their assessment of acceptability and rating.
- Detail what cover is available for damage occurring away from the client's premises and identify the main extensions available.

Intermediate Commercial Property

Description

This interactive workshop is designed to develop knowledge and skills in this specialist topic. The session provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. This one-day interactive workshop takes a more in-depth look at commercial property insurance, policy cover and associated claims and underwriting considerations.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

This workshop has been designed for delegates with previous involvement in commercial property insurance. A good grounding in commercial property insurance practices is desirable.

Learning Objectives

The workshop takes a practical and thought-provoking look at:

- Practical applications including the different types of cover available, and considerations of which cover is most suitable for each case.
- Risk assessment and the major hazards presented with different classes of business.
- Commercial property insurance policy cover and typical extensions available and restrictions which might be applicable in different circumstances.
- Policy terms, conditions and exclusions.
- Key underwriting considerations.
- Key claims considerations and the principles of claims handling for commercial property insurance.
- Typical methods of investigation used in commercial property insurance claims handling.

Learning Outcomes

By the end of the workshop delegates will be able to

- Describe the main aspects of commercial property insurance and the protection provided.
- List the most commonly encountered issues.
- Have a sound understanding of the various types of cover available.
- Outline the policy structure and the levels of cover which may be available.
- Explain more advanced applications of how the cover works.
- Outline the key underwriting and claims considerations relating to commercial property insurance.

Intermediate Construction Insurance

Description

This workshop provides an explanation of the covers specific to the construction industry, the standard forms of contract entered into by contractors, and an analysis of how risks are assessed. Whilst there is some consideration of the contractual implications within JCT for liability risks, the prime focus of the workshop is on contractors' all risks, and property insurance. This is an interactive workshop with a mixture of tuition and case studies.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

This workshop has been designed for delegates with hands-on involvement in construction insurance.

Learning Objectives

Risks specific to contractors

- Contract Works
- Plant – own and hired in
- Existing Property
- Liability risks
- Design and Build risks
- Delay in completion

An Introduction to Contract Conditions

- JCT standard form of contract including design and build version
- Risk and responsibilities
- Insurance clauses – Joint Names implications
- Collateral Warranties

Policy Cover – an analysis of

- Contractors All Risks
- Employers Liability
- Public and Product Liability
- Non-negligence covers – 21.2.1 and 6.5.1
- Design and Build Professional indemnity

Learning Outcomes

By the end of the workshop delegates will be able to:

- Understand why the cover is needed and how it is provided.
- Understand the content of the risk and insurance clauses in the JCT standard and design and build contract and the implications for both contractors, insurers and property owners.
- Be familiar with the cover, exclusions and restrictions usually found in a contract works policy.
- Be aware of the factors insurers consider in the assessment and pricing of risk.

Intermediate Cyber Risks Insurance

Description

This interactive workshop is designed to develop knowledge and skills in this specialist topic. The session provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each workshop is typically one day, but this can be tailored to the needs of your group.

The modern business world is now heavily reliant on IT systems and infrastructure to support its business-critical activities. Businesses also operate in a connected world where they and their employees make use of email, social networking and cloud computing. All this leads to additional risks to the business, some of which is not customarily covered by existing insurance arrangements.

This workshop follows on from our introductory Cyber Insurance workshop and looks, in greater detail, at the extent of cover provided by conventional insurance policies against cyber risks, as well as the conditions and exclusions of specialist cyber risks insurance policies. The workshop also looks at the different cover options available, how they apply to different clients, the key risk management issues and claims matters.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

Delegates who have attended our introductory Cyber Insurance workshop, or those that have an understanding of the concepts of cyber insurance, who would like to go further into the application of conventional and specialist cyber insurance covers, conditions and exclusions.

Learning Objectives

The workshop takes a practical and thought-provoking look at:

- What are cyber risks?
- The impact of cloud computing on cyber risks.
- Cover provided by conventional insurance policies against cyber risks – gap analysis.
- The cover, conditions and exclusions of specialist cyber risks insurance policies in the UK – identifying main differences in cover available.
- Major risk management issues of cyber risks.
- Examples of cyber risks insurance claims and the issues of dealing with such claims.

Learning Outcomes

By the end of the workshop delegates will be able to demonstrate an understanding of:

- The main cyber risks and which types of customer could benefit from insurance against cyber risks.
- Impact of cloud computing on cyber risks.
- The extent of cover provided by conventional insurance policies against cyber risks.
- The policy cover, conditions and exclusions of specialist cyber risks insurance policies in the UK and when separate policies are appropriate.
- Different cover options available in the cyber policy market and how they apply to different clients.
- Key risk management issues.
- How cyber risk insurance claims arise and the issues of dealing with these claims.

Intermediate Directors' and Officers' (Including Employment Practices) Liability

Description

This interactive workshop is designed to develop knowledge and skills in this specialist topic. The workshop provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each workshop is typically one day, but this can be tailored to the needs of your group. This workshop provides participants with an opportunity to explore directors' and officers' liability insurance in more depth than the introduction-level workshop.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

This workshop provides training for those who have a basic understanding of directors' and officers' liability and employment practices liability but who wish to develop further their knowledge and the methods of providing appropriate insurance cover.

Learning Objectives

The workshop takes a practical and thought-provoking look at:

- Who is insured.
- How liability can arise, including the Bribery Act 2010.
- Risk assessment case study.
- Policy covers comparison, including major exclusions and extensions.
- How D&O cover fits in the client's portfolio.
- Underwriting considerations.
- Dealing with a directors' and officers' liability claim.

Learning Outcomes

By the end of the workshop delegates will be able to:

- Explain the major benefits of a directors' and officers' liability policy.
- Explain how directors' and officers' liability insurance dovetails with other liability insurances.
- Identify the underwriting considerations for directors' and officers' liability insurance.
- Identify clients who have greatest need for directors' and officers' liability insurance.
- Outline how to handle a directors' and officers' liability insurance claim.
- Explain current developments in the directors' and officers' liability insurance market.

Intermediate Liability Insurance

Description

This interactive workshop is designed to develop knowledge and skills in this specialist topic. The session provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each workshop is typically one day, but this can be tailored to the needs of your group. This workshop will provide participants with an opportunity to explore EL, public and products liability insurance in more depth than the introductory workshop.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

Anyone who wishes to widen their technical knowledge on liability insurance and who have attended the Introduction to Liability Insurance workshop.

Learning Objectives

The workshop takes a practical and thought-provoking look at:

- The various types of EL, PL and products liability policy available and considers how each works in detail.
- The various ways in which liability arises, either through Acts of Parliament, common law or court precedent, reviewing court decisions.
- The policy wordings and the typical extensions and restrictions applying in different circumstances.
- Policy covers as affected by wordings such as claims occurring or claims made.
- Underwriting methods, both for individual risks and also for whole accounts and the impact of legislation including health and safety regulations.
- The consideration given to disease claims.
- The way claims are handled with specific reference to court procedures and protocols.

Learning Outcomes

By the end of the workshop the delegates will be able to:

- Explain recent developments which impact liability insurance exposure.
- Outline how a liability policy works and what it covers.
- Explain liability policy jargon e.g., 'claims made' v. 'claims occurring'.
- Compare and contrast the coverage provided under employers' liability, public liability and products liability policy wordings
- Explain how organisations should set the right liability limits.
- Describe how liability underwriters set their premiums.
- Identify how liability claims are handled.

Intermediate Personal Injury Claims

Description

The aim of this workshop is to provide an overview of personal injury claims, including investigating and valuing claims, the litigation process and discussion of current issues. It will be relevant to those seeking to develop their knowledge of liability and motor claims.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery/Face to Face

 **CPD:** Recognised

Who should attend

It will be relevant to those seeking to develop their knowledge of liability and motor claims.

Key Topics Covered

- An overview of the claims process as it relates to personal injury claims, including the role of the broker
- Liability
 - Establishing policy liability – is the claim covered?
 - An overview of how legal liability arises
 - Investigating legal liability – is the insured legally liable?
- Quantum (the amount of the claim)
 - Heads of claim
 - Reserving
 - Investigating quantum
 - Valuing the claim
 - The role of rehabilitation
 - Structured settlements
- Negotiation
 - Negotiating legal liability and quantum
- Litigation
 - The structure of the courts
 - An overview of the legal process, particularly as it relates to the policyholder and broker

Intermediate Reinsurance

Description

This interactive workshop is designed to develop knowledge and skills in this specialist topic. The session provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each workshop is typically one day, but this can be tailored to the needs of your group. This workshop covers the key elements of reinsurance methods and practices, including the application of facultative and treaty business and the considerations made when transacting reinsurance and underwriting proportional and non-proportional treaties.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

Anyone who wishes to widen their technical knowledge on reinsurance.

Learning Objectives

The workshop takes a practical and thought-provoking look at:

- Proportional reinsurance.
- Non-proportional reinsurance.
- Liability.

Learning Outcomes

By the end of the workshop the delegates will have:

- Knowledge of current reinsurance methods and practices.
- Gained an understanding and technical knowledge – through detailed study with a leading market practitioner – of the major types of reinsurance.

Intermediate Professional Indemnity Insurance

Description

This interactive workshop is designed to develop knowledge and skills in this specialist topic. The workshop provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each workshop is typically one day, but this can be tailored to the needs of your group. This workshop provides a thorough overview of professional indemnity insurance.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

This workshop has been designed for delegates with previous involvement in professional indemnity insurance and who wish to extend their knowledge. Anyone selling PI cover should consider this workshop, unless a specialist in this field.

Learning Objectives

The workshop takes a practical and thought-provoking look at:

- The duty of care owed by professionals – legal liability and breach of contract.
- Examples of professional negligence claims.
- Differing professional exposures.
- Professional indemnity and errors and omissions policy – key elements of cover.
- Principal exclusion.
- The principal extensions.
- The proposal and underwriting process – how an underwriter uses the details provided to rate the risk.
- The claims process, including incident reporting and PI protocols.

Learning Outcomes

By the end of the workshop the delegates will be able to:

- Outline the different types of cover which may apply to different types of professions.
- Describe the information required to obtain a professional indemnity insurance quotation.
- Outline the principal underwriting considerations which apply when underwriting professional indemnity insurance.
- Explain the important points to remember when dealing with a professional negligence claim.
- Describe how brokers should handle the current professional indemnity insurance market and what they should be telling their customers.

Advanced Cargo Claims

Description

Improve your cargo claims knowledge through case studies! This is an advanced, highly interactive workshop intended for those who have either completed the CII Introduction to Cargo Claims Workshop and or have a minimum of 2 years experience in the cargo claims handling field. This workshop is not suitable for beginners.

Summary

 **Duration:** 2 half-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

Claims adjusters, cargo claims brokers, underwriters, importers and exporters, logistics professionals, solicitors, independent adjusters and surveyors who have either attended the CII Introduction to Cargo Insurance workshop and or have a minimum of two years experience in the business of cargo insurance. This workshop is not suitable for beginners.

Learning Outcomes

By the end of the workshop, participants will be able to:

- Demonstrate a sound understanding of the principles relating to Particular Average, Total Loss and General Average.
- Identify the legal and regulatory regimes governing international transportation of cargo, in particular as they relate to the principles of Subrogation.
- Have an advanced understanding of the key provisions of the Marine Insurance Act and Insurance Act as they relate to the handling and adjustment of cargo claims.
- Explain the procedures relating to the handling and adjustment of cargo claims.
- Identify and describe key documents associated with cargo claims.
- Gain competence in the adjustment of Particular Average claims.
- Demonstrate a practical understanding of the key elements of General Average adjustments.
- Understand the principles relating to adjusting claims under stock through put and DSA cargo policy extensions.

Advanced Cargo Insurance

Description

Improve your cargo insurance knowledge through case studies! This is an advanced, highly interactive workshop intended for those who have either completed the CII Introduction to Cargo Insurance Workshop and or have a minimum of 2 years experience in the cargo class of insurance. This workshop is not suitable for beginners.

Summary

 **Duration:** 2 half-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

Brokers, underwriters, importers and exporters, logistics professionals, solicitors, claims adjusters and surveyors who have either attended the CII Introduction to Cargo Insurance workshop and or have a minimum of two years experience in the business of cargo insurance.

Learning Outcomes

By the end of the workshop, participants will be able to:

- Demonstrate a sound understanding of how international trade and finance works.
- Identify the legal and regulatory regimes governing international transportation of cargo.
- Have an advanced understanding of the key provisions of the Marine Insurance Act and Insurance Act as they relate to the cargo insurance industry.
- Identify principal areas of risk assessment at an advanced level, in relation to a cargo policy.
- Explain, at an advanced level the different types of cargo insurance coverage available including speciality areas of coverage dedicated to special types of cargo; stock through put coverage and DSU.
- Gain competence in the practice of cargo underwriting based on case studies.
- Describe the claims handling and adjusting process in relation to cargo insurance.

Advanced Claims

Description

This one day interactive workshop provides delegates with knowledge and skills, and a deeper insight to help manage claims effectively. This workshop is designed for all those who are involved in the management of claims. It will help those who are advising clients, liaising with insurers or ensuring the process runs as smoothly as possible.

The workshop will be highly interactive with delegate participation and engagement throughout.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

Insurers, reinsurers, brokers, MGAs, service providers and underwriters, claims handlers, finance, actuaries, IT and anyone else interested in advanced claims and claims management.

Learning Outcomes

By the end of the workshop, participants will be able to:

- The Claims Environment
- The role of the Claims manager and regulation
- Claims Service Management
- Management of Claims Handling Procedures
- Claims centre and catastrophe management
- Claims technical management
- Cost of claims management

Advanced EL/Products Liability

Description

This interactive workshop is designed to develop knowledge and skills in this specialist topic. The workshop provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each workshop is typically one day, but this can be tailored to the needs of your group. In this workshop we develop and update delegates' knowledge of liability insurance.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

Those who have an understanding of the principle of insurance, together with a grounding in products and general liability.

Learning Objectives

The workshop takes a practical and thought-provoking look at:

- Recent changes in case law and statute.
- The types of liability coverage.
- Review liability policy wordings.

Learning Outcomes

By the end of the workshop the delegates will be able to:

- Review and update customers on recent changes in case law and statute which might impact their liability exposures.
- Advise a range of clients on the types of liability coverage they require to protect themselves against their liabilities including employers' liability, public liability, products liability, professional indemnity, management liability, cyber liability, motor and environmental impairment liability.
- Ensure that clients have appropriate limits of indemnity.
- Ensure that liability coverage dovetails appropriately and there are no gaps in coverage.
- Review liability policy wordings to ensure they include appropriately worded and clear policy extensions.
- Advise clients on what support they will require in the event of a large liability claim.

Advanced Reinsurance

Description

This one day workshop will provide you with an advanced understanding of reinsurance.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery/Face to Face

 **CPD:** Recognised

Who should attend

Insurers, reinsurers, brokers, MGAs, underwriters, claims, compliance, actuaries, loss adjusters, service providers and anyone looking to advance their knowledge and understanding of reinsurance.

Learning Objectives

- Evaluate the management of reinsurers;
- Evaluate and apply reinsurance principles and practices;
- Evaluate the application of technical reinsurance principles; and
- Analyse the financial aspects of the reinsurance function.

Applications/Implementation of new technologies (Insurtech) for claims management

Description

This workshop will explore the use of data and the application of new technologies such as Artificial Intelligence and Blockchain in insurance. The workshop will explain the concept of data and big data and how it can be used in an insurance context to derive valuable insights for the purpose of pricing, underwriting, or settling and managing claims.

This workshop will focus on the practical applications of blockchain technologies and artificial intelligence in the insurance value chain and explore existing use cases. It will also detail the tools needed to develop new use cases that are versatile and adaptive to developing customer needs.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery/Face to Face

 **CPD:** Recognised

Who should attend

C-Level Executives and Senior Management, Managers in Insurance and Reinsurance; Service Providers to the Insurance Profession; Brokers, Agents, and Intermediaries seeking deeper insights into data analytics, AI, and the evolving Insurtech landscape; First-Line and Second-Line Employees in claims, underwriting, pricing and customer services.

Learning Outcomes

- Understand the concept of data.
- The meaning of Big Data and its characteristics
- Structured and Unstructured Data
- Limitations of Data
- Data Governance
- Big Data Analytics
- Different levels of Analytics
- The meaning of Artificial Intelligence
- The Advent of AI
- Understand Machine Learning and its components.
- Understand Deep Learning and its components.
- Opportunities of AI in insurance
- Blockchain Technologies
- Limitations of these new technologies
- Applications and Use cases in insurance

Bloodstock and Equine Insurance

Description

This one day interactive workshop will develop delegates' knowledge of the bloodstock market (racing and breeding) and general equine insurance requirements. It will look at covers available within the market place along with their exclusions and limitations.

Summary

 **Duration:** 2 half-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery/Face to Face

 **CPD:** Recognised

Who should attend

This workshop has been designed for delegates with who are new to bloodstock and equine insurance or those with a hands-on involvement

Key Topics Covered

- Background to the equine species
- Types of breeds, colours and their uses
- Age classification for bloodstock
- Basic anatomy
- Diseases and conditions of the horse
- Bloodstock territories
- Thoroughbred breeding and values
- Underwriting considerations for bloodstock
- Bloodstock cover, extensions and exclusions
- Underwriting considerations for horses and ponies
- Equine insurance cover, exclusions, extensions and limitations
- Veteran Cover
- The claims process

Learning Outcomes

By the end of the workshop delegates will be able to:

- Explain the background and development of the equine and bloodstock industry
- Describe the basis anatomy of the equine species
- Understand common ailments and their impact on insurance
- List the underwriting considerations for bloodstock risks
- Explain the features and benefits of a bloodstock insurance policy and the extensions of cover available
- Understand how the class of use impacts on the premium for horse and pony policies
- Describe the cover offered under a general equine policy and the extensions of cover offered
- Recognise the key differences in the cover offered for veteran horses and ponies
- Explain the claims process

Climate Change

Description

This half-day introductory, online workshop will help Delegates to have an understanding of the impact of climate change on insurance organisations and their clients.

The workshop will be highly interactive with delegate participation and engagement throughout.

Summary



Duration: 1 half-day workshop



No of Attendees: 12–16



Format: Virtual delivery



CPD: Recognised

Who should attend

Insurers, reinsurers, brokers, MGAs, service providers and underwriters, claims handlers, finance, actuaries, IT and anyone else interested in climate change and the impact on the insurance industry.

Learning Outcomes

By the end of this programme, delegates will have an understanding of the impact of climate change on insurance organisations and their clients in relation to:

- Extreme weather events
- How insurers and regulators deal with climate related risks
- Possible solutions and insurance programmes that can be offered by insurance organisations to our clients
- The data required by insurance organisations to understand exposures

Commercial Property Insurance

Description

This two half-days online workshop we will both revisit the fundamentals of commercial property insurance as well as updating delegates on the latest developments in commercial property insurance.

Summary

 **Duration:** 2 half-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

Brokers, underwriters, risk surveyors and loss adjusters who are familiar with commercial property insurance or seeking to consolidate their technical knowledge.

Learning Outcomes

On completion of the workshop, delegates will be able to:

- Describe the main risks to commercial property and some of the principal risk controls
- Explain the purpose and uses of a property loss control survey
- Explain why commercial property coverage is purchased
- Describe the coverage provided under a commercial property insurance policy
- Explain the principal extensions and exclusions which apply to commercial property policies
- Describe the difference between "All Risks " and "Fire & Special Perils" insurance
- Explain how insureds should establish the correct sums insured for buildings, machinery equipment and stock
- Describe how the commercial property coverage cover dovetails with Computers, Money, Marine Cargo, Goods in Transit, Fidelity and Cyber policies
- Describe the information required to obtain a Fire/commercial property quotation and the principal underwriting considerations which apply
- Explain how underwriters arrive at their rating for commercial property risk
- Explain the importance of Estimated Maximum Loss calculations
- Describe some ways for businesses to manage the risks of damage to their commercial property more effectively
- Outline the property claims process and describe the role of loss adjusters and loss assessors

Investment Bonds and Tax

Description

The advice for Investment Bonds will increase as the Government bears down on Capital Gains Tax – be ready to deal with all aspects of Bond advice.

Summary

 **Duration:** 1 half-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

Advisers, Paraplanners, whether at diploma or Chartered level.

Key Topics Covered

- Overview of Investment Bonds
- Uses as an investment product
- Chargeable events and the tax impact
- Organising Bonds tax-efficiently for clients
- Case study to put some of the ideas into action
- Group review of case study
- Summary and next steps

Learning Outcomes

By the end of this workshop, Delegate will be able to:

- Explain the main uses of Investment bonds
- Identify chargeable events and explain who they are taxed
- Outline ways in which Bonds can be used in financial planning
- Apply your knowledge to a client case study

Management Liability Insurance

Description

Companies typically purchase either directors and officers liability (D&O) coverage or a management liability policy (including D&O, employment practices liability coverage and corporate liability/entity coverage).

In this half day virtual introductory workshop we aim to both develop and update participants knowledge on both D&O and management liability policies

Summary

 **Duration:** 1 half-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

Brokers and underwriters who are new to management liability insurance or seeking to consolidate and update their technical knowledge

Learning outcomes

On completion of the workshop delegates will be able to:

- Describe the duties of company directors are changing
- Provide examples of claims that would be covered under the D&O, employment practices liability and corporate liability/entity sections of a Management Liability policy
- Describe the benefits of a Management Liability policy to both individual directors and officers and their organisations
- Describe the underwriting information and required to obtain a quotation for Management Liability insurance
- Explain the important points to remember when dealing with a Management Liability claim

Mitigating Inheritance Tax

Description

This session, which will include insight into the proposed pension changes from April 2027, is for those involved in identifying IHT transactions, calculating the tax due and then looking for ways to mitigate or eradicate the liability, so saving clients (or more often, their beneficiaries) IHT.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

Advisers, Paraplanners, whether at diploma or Chartered level, active in the estate planning market.

Key Topics Covered

During this session you will cover:

- The 13 steps to calculate an IHT liability
- Lifetime gifting and use of Trusts
- Gifts on death and the impact of pension funds
- Making tax-efficient alterations to an estate after death
- Case study to put some of the ideas into action
- Group review of case study
- Summary and next steps

Learning Outcomes

By the end of this programme, delegates will be able to:

- Describe a 13 step framework that calculates IHT liabilities
- Calculate lifetime and death IHT liabilities
- Identify ways of mitigating, providing for or eradicating an IHT liability
- Explain the implications for clients of the new pension rules from April 2027
- Apply your knowledge to a client case study

Personal Taxation – Refresher

Description

This one-day session will sharpen up your knowledge of personal tax, utilising a range of visual aids, interactive exercises and support materials to help you deal with advice opportunities.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery/Face to Face

 **CPD:** Recognised

Who should attend

Those looking to:

- Refresh the knowledge and application skills as a Financial Adviser/Paraplanner at Chartered (level 6).
- Fulfil a client focused structured CPD session of seven hours.

Learning Outcomes

By the end of the workshop the delegates will have covered:

- Income tax
 - Steps to calculate income tax.
 - Use of allowances
 - SRB, PSA and DA and others.
 - Adjusted net income victims and planning ideas.
 - Calculating liabilities and identifying planning points to reduce tax.
 - Investment bond taxation
- CGT
 - Calculation exercise to review process.
 - Exemptions and reliefs
 - Disposing of businesses.
- Inheritance tax
 - Two doors – establishing all the figures to calculate the IHT liability.
 - Nil rate bands.
 - Exemptions and reliefs.
 - Lifetime gifting and life cover.
- Planned changes to the tax rates and allowances.

Pensions – Refresher on Rules and Regulations

Description

This one-day workshop will provide a detailed overview of pensions, utilising a range of visual aids, interactive exercises and support materials to help you deal with advice opportunities.

Summary

-  **Duration:** 1-day workshop
-  **No of Attendees:** 12–16
-  **Format:** Virtual delivery/Face to Face
-  **CPD:** Recognised

Who should attend

Those looking to:

- Refresh the knowledge and application skills as a Financial Adviser/Paraplanner at Chartered (level 6)
- Fulfil a client focused structured CPD session of seven hours

Learning Outcomes

By the end of the workshop the delegates will have covered:

- Money in: Annual Allowance (AA) and tax relief
 - Tax relief – limits and how claimed.
 - AA ground rules – DC and DB schemes
 - Tapered AA.
 - Carry forward.
 - Planning ideas to maximise contributions.
 - AA charge and how to minimise or avoid it.
- Day to day pension management
 - Reviewing less common pension products.
 - Death benefits.
 - Income options.
- Money out: Lifetime Allowance (LTA)
 - LTA ground rules.
 - Calculating LTA values in different client scenarios.
 - Protection regimes.
 - Trivial pensions/small pots.
- Planned changes to Pensions.

Trusts and Trust Taxation

Description

This session will build your knowledge and confidence of how to identify different types of trust and how they are used and taxed.

Summary

 **Duration:** 1 half-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

Advisers, Paraplanners, whether at diploma or Chartered level.

Key Topics Covered

During this session, we will cover:

- Background and purposes of Trusts
- Types of trust and who is involved
- Trust assets and how taxed for
- Income tax and CGT
- Inheritance tax and Trusts
- Case study to put some of the ideas into action
- Group review of case study
- Summary and next steps

Learning Outcomes

By the end of this session, delegates will be able to:

- Explain the main uses of trusts
- Describe the roles and responsibilities of those involved with Trusts
- Identify different types of trusts
- Explain who Trusts are taxed
- Apply your knowledge to a client case study

12 Ways of Reducing Income Tax

Description

Using a six-step process, the session will look at different client scenarios where income tax can be saved to help people have more money for other purposes

Summary

 **Duration:** 1 half-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

This workshop is designed for Advisers and Paraplanners, whether at diploma or Chartered level.

Key Topics Covered

Using a six-step process, the session will look at different client scenarios where income tax can be saved to help people have more money for other purposes.

The workshop will cover:

- 12 ways of reducing income tax
- The 6 steps to calculate an income tax liability
- Organising gross income efficiently
- Deductions and allowances available
- Tax efficient investments for 2024/25 and beyond
- Case study to put some of the ideas into action
- Group review of case study
- Summary and next steps

Learning Outcomes

By the end of the workshop, delegates will be able to:

- Describe a 6-step framework that calculates income tax liabilities
- Calculate tax liabilities for different client scenarios
- Identify ways of mitigating, providing for or eradicating an income tax liability
- Apply your knowledge to a client case study



Leadership and Professional Development Skills

Enhance your leadership skills to maximise your performance and inspire your team.

Application and Implementation of New Technologies in Insurance

Description

This workshop will explore the use of data and the application of new technologies such as artificial intelligence and blockchain in insurance. The workshop will explain the concept of data and big data and how it can be used in an insurance context to derive valuable insights for the purpose of pricing, underwriting, or settling and managing claims.

This workshop will focus on the practical applications of blockchain technologies and artificial intelligence in the insurance value chain and explore existing use cases. It will also detail the tools needed to develop new use cases that are versatile and adaptive to developing customer needs.

Summary

-  **Duration:** 1-day workshop
-  **No of Attendees:** 12–16
-  **Format:** Virtual delivery/Face to Face
-  **CPD:** Recognised

Who should attend

C-Level Executives and Senior Management, Managers in Insurance and Reinsurance; Service Providers to the Insurance Profession; Brokers, Agents, and Intermediaries seeking deeper insights into data analytics, AI, and the evolving Insurtech landscape; First-Line and Second-Line Employees in claims, underwriting, pricing and customer services.

Learning Outcomes

By the end of this workshop delegates will have a basic understanding of:

- The concept of data.
- The meaning of big data and its characteristics.
- Structured and unstructured data.
- Limitations of data.
- Data governance.
- Big data analytics.
- Different levels of analytics,
- The meaning of artificial intelligence.
- The advent of AI.
- Machine learning and its components.
- Deep learning and its components.
- Opportunities of AI in insurance.
- Blockchain technologies.
- The limitations of these new technologies.
- Applications and use cases in insurance.

Application and Implementation of New Technologies for Claims Management

Description

When writing an insurance policy, an insurer is effectively making a promise to the policyholder that, in the event where a loss event occurs that the insured is protected for under the policy, the insurer will pay out the claim.

Simply put, an insurance company collects premiums and settles claims on behalf of its policyholders. Consequently, one of its key drivers of profitability depends on how the insurer settles its claims, the speed of its claim settlement process or how easy its claims process is. With the ever-increasing advancements in technology, the claim function of an insurance company has evolved.

This workshop introduces the current advancements in technologies used in managing claims. The workshop will look at different aspects of the claim process which could be automated using technology and gives the participant an idea of how data and technology can support in reserving.

Summary

-  **Duration:** 1-day workshop
-  **No of Attendees:** 12–16
-  **Format:** Virtual delivery/Face to Face
-  **CPD:** Recognised

Who should attend

C-Level Executives and Senior Management, Managers in Insurance and Reinsurance; Service Providers to the Insurance Profession; Brokers, Agents, and Intermediaries seeking deeper insights into data analytics, AI, and the evolving Insurtech landscape; First-Line and Second-Line Employees in claims, underwriting, pricing and customer services.

Learning Outcomes

By the end of this workshop delegates will have a basic understanding of:

- Conversational interfaces and their uses cases in the claims-handling process.
- How appropriate use of technology will speed up the assessment of damage and faster settlement of claims.
- Risk calculation and assessment using telematics data.
- Areas where blockchain can support claims handling and fraud detection.
- Claims quantification using data analytics and artificial intelligence.
- Limitations of these new technologies.

Assertiveness Skills Workshop Getting Your Point Across

Description

This **half-day** online interactive Training Workshop, will help Delegates to:

- Understanding Assertiveness - what assertiveness is and isn't
- Skills of Assertiveness and reasons to use assertive techniques
- Positive thinking and self-awareness
- Understanding and managing 'self-talk'
- Building confidence and self-esteem

Summary



Duration: 1 half-day workshop



No of Attendees: 12–16



Format: Virtual delivery



CPD: Recognised

Who should attend

This workshop is valuable for anyone who wants to enhance their assertiveness skills, build a confident, credible image and develop effective workplace relationships. It will help anyone who relies on influence rather than authority to achieve their goals.

Learning Outcomes

By the end of the workshop delegates will be able to:

- Describe the main features of assertive, submissive and aggressive behaviour
- Identify their own preferred behavioural profile
- Identify non-verbal behaviour and the impact that this behaviour can have on others
- Identify areas of their working lives where they should improve their assertive behaviour
- Adopt and practice techniques to help them behave in an assertive manner
- Develop a strategy to cope with difficult and aggressive people

Assertiveness, Personal Impact and Emotional Intelligence

Description

This online workshop will focus on developing assertiveness skills and building confidence (and changing attitudes and behaviours) and therefore increasing the chance of success in any human transaction. The workshop will look at the impact we have on others, and how a positive approach is key.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

This workshop is ideal for those who want to improve their assertiveness, personal impact, and emotional intelligence to enhance interactions and relationships. It's especially beneficial for those seeking to build confidence, manage emotions effectively, and communicate more effectively in the workplace.

Key topics Covered

Assertiveness

- Understanding Assertiveness - what assertiveness is and isn't
- Skills of Assertiveness and reasons to use assertive techniques
- Positive thinking and self-awareness
- Understanding and managing 'self-talk'
- Building confidence and self-esteem

Personal Impact

- The importance of first and last impressions
- Making a positive impact – personal awareness and personal style, use of personality and behavioural interaction
- Recognising how our behaviour affects others
- Using a positive approach

Emotional Intelligence

- The five 'domains' of EQ
 - Knowing your emotions
 - Managing your own emotions
 - Motivating yourself
 - Recognising and understanding other people's emotions
 - Managing relationships and the emotions of others
- How our personalities affect the way we communicate
- The principles of Transactional Analysis

Learning Outcomes

By the end of the workshop, delegates will be able to:

- Differentiate between Assertive, Aggressive and Passive behaviours
- Manage passive and aggression in an assertive manner
- Understand the importance and relevance of personal impact and have an awareness as to how others might see them
- Explain how their behaviour affects the behaviour of others
- Be able to understand how to make a positive and professional impact on others
- Describe the importance of Emotional Intelligence

Building High Performing Teams

Description

Effective team performance is essential for the success of any organisation. This workshop is designed to empower delegates in optimising their teams' capabilities and fostering continuous development. Tailored for those who wish to elevate team performance and unlock untapped potential, it offers insights into the dynamics and intricacies of team collaboration.

Summary

 **Duration:** 1/2 day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

This workshop caters to current and aspiring leaders who recognise the pivotal role of teamwork in achieving organisational success.

Ideal for team leaders, project managers, HR professionals, and entrepreneurs, the workshop empowers individuals to cultivate environments primed for continuous growth and success.

Learning Outcomes

By the end of the workshop delegates will be able to:

- Gain an understanding of team principles and dynamics.
- Recognise and appreciate the diverse roles within teams.
- Explore strategies to enhance interpersonal interactions among team members

Business Finance and Interpreting Financial Statements

Introduction

In today's dynamic business landscape, fluency in financial language is not just an advantage — it's a necessity. Whether you're a newcomer to finance or a seasoned professional seeking to sharpen your analytical skills, our workshop is tailored to meet your needs.

Summary

 **Duration:** 2 half-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

Whether you're a broker, underwriter, or finance enthusiast, this workshop offers a valuable boost to your professional growth. It combines a practical introduction or refresher on finance and financial statements with advanced insights for D&O and financial lines professionals, focusing on interpreting client accounts.

Key Topics Covered

The workshop is split into two main parts:

Session 1: commercial cashflow, process and language

Session 2: financial statements and basic interpretation.

It blends input sessions, discussion and short practical exercises. Session 2 uses a progressive case study of a real company to enable learning by application.

It assumes some knowledge of business finance. Participants receive a set of stand-alone business finance notes which are written to support the workshop and for reference afterwards. Support notes and exercises are sent out as a pdf and participants beforehand. The exercises are used in hard copy during the Sessions.

Session 1

Session duration: 4 hours

Learning Objectives

This focused introduction to financial analysis rectifies this by providing a foundation. For people who have had little formal exposure to business finance, it uses simple models to demystify the sources and uses of money in business, its measurement and reporting, and what that can reveal.

By the end of the session, participants will be able to:

- Describe the cash flow in a commercial firm, and the risks
- Describe the sources of funding and the implications of each
- Explain the purposes of and interpret financial statements: reading between the lines
- Explain and apply the financial language of measurement and reporting
- Apply the key ratios to measure financial performance, resilience and the critical indicators of a company's health
- Introduce and explore "M&As", "MBOs" and "IPOs": the drivers and implications

Learning Outcomes

- Cashflow: keeping the business money machine working
- Cash v profit
- Financial concepts
- Sources of finance: equity and debt
- Working capital dynamics
- Assets and liabilities
- Fixed and variable costs
- Creditors, debtors and credit control
- Revenue, cost and break even
- Depreciation and amortisation
- The three main financial statements
- Solvency and liquidity
- Key ratios and financial analysis of profit, liquidity and return
- Mergers and acquisitions, Management buy outs, Initial public offerings

Session 2

Session duration: 3.5 hours

Learning Objectives

This second workshop follows on from the initial introduction into financial statements and financial, and an introduction the critical indicators of financial health. In the context of possible D&O risk triggers, we revise some of the basic principles and go on to explore some of the more advanced tools and perspectives of financial analysis. We apply them to the original case study and then discuss what aspects might be most material in different industry business models.

The session will cover:

- Highlight the particular duties, responsibilities and legal obligations of directors in the UK
- Revise cash flow and the main financial statements
- Describe capital gearing, identify the benefits and assess the inherent risks
- Explore the alternative ways of investment appraisal, and apply the tools of discounted cashflow/net present value/internal rate of return/hurdle rates
- Identify the inherent risks within any form of investment appraisal
- Outline the alternative ways of company valuation, and when/where each would be most appropriate
- Extend ratio analysis to earnings per share; price/earnings and market capitalisation
- Draw out some the financial characteristics material to different industries

Learning Outcomes

This is a more practical, hands-on workshop.

Part A: Individual needs/desired outcomes and an overview of Directors duties within UK governance. Revision, in the form of a practical exercise to assess adequate liquidity.

Part B: "Advanced concepts" and application to the case study firm from the Part 1 workshop.

Part C: What to look at. Different business models have different financial characteristics and risk triggers.

The additional topics will be covered by separate handouts specific to each, along with a pdf of the PowerPoint visuals.

Consumer Duty – Action Planning Workshop

Description

The new Consumer Duty sets higher and clearer standards of consumer protection across financial services, and requires firms to put their customers' needs first.

This one-day, highly interactive workshop aims to develop a practical understanding and foundation plan for the actions required to deliver effective and efficient outcomes in line with the Consumer Duty expectations.

What are the Consumer Duty Rules:

- A new Consumer Principle that requires firms to act to deliver good outcomes for retail customers.
- Cross-cutting rules providing greater clarity on our expectations under the new Principle and helping firms interpret the four outcomes (see below).
- Rules relating to the four outcomes we want to see under the Consumer Duty. These represent key elements of the firm-consumer relationship which are instrumental in helping to drive good outcomes for customers.

These outcomes relate to:

- products and services;
- price and value;
- consumer understanding; and
- consumer support

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery/Face to Face

 **CPD:** Recognised

Who should attend

Managers, team leaders and all those seeking to expand their skills on the topic. Wherever you are on your career journey, developing and maintaining your personal and professional skills helps to ensure you continue to grow and thrive.

Learning Outcomes

By the end of this workshop delegates will be able to:

- Identify the key areas for Consumer Duty compliance.
- Identify the key actions within these areas.
- Explain the rationale behind the action planning in terms of consumer benefit and regulatory interest.
- Ensure their plans are refined to improve the likelihood of success.
- Plan their own in-house activity to deliver better consumer outcomes.

Data Driven Decision Making

Description

The ability to analyse and manage data and information can lead to increased competitiveness, innovation, productivity and customer satisfaction. However, with data and information volumes increasing at unprecedented levels, the ability to interpret, use, and harness 'big data' can become both an organisational and a strategic leadership challenge.

The aim of this module is to equip strategic leaders with an understanding of the purpose and practices of interpreting, managing and presenting business data and information to inform effective decision making. This module will also explore the impact of legal frameworks and ethical considerations that impact the collection and use of data.

Summary



Duration: 1-day workshop



No of Attendees: 12–16



Format: Virtual delivery/Face to Face



CPD: Recognised

Who should attend

Managers, team leaders and all those seeking to expand their skills on the topic. Wherever you are on your career journey, developing and maintaining your personal and professional skills helps to ensure you continue to grow and thrive.

Learning Outcomes

By the end of this workshop delegates will be able to:

- Analyse the use of data and information in decision making.
- Examine different types of data and information, its value and how it can be used for more effective decision making.
- Explore the impact of legal frameworks and ethical consideration on the use of data and information in decision making.
- Discuss the impact of stakeholder needs on the collection, analysis and interpretation of data and information.
- Discuss criteria used for selection of valid, reliable and accurate data and information.
- Evaluate the use of tools and techniques for analysing and interpreting data and information to support decision making.
- Practice analysing data and information to making effective decisions.
- Review best practices and methods of presenting data and information for maximum impact.

Enterprise Risk Management & Corporate Governance

Description

“The long-term success of a company is dependent on the sustainability of its business model and its management of risk.”

FRC Guidance on Board Effectiveness, 2018

Risk management is not a veneer on corporate governance. Neither is it just risk avoidance nor risk removal. Business strategy and risk management go hand in hand and inform each other to produce intelligent understanding of the types and level of risk that an organisation will face or chooses to accept. Done well, it generates firm-wide acceptance to reduce the probability of both predictable and unforeseen events that could cause damage and minimise that damage if events do occur.

Regulators will codify much of what constitutes good risk management, as the EU Solvency II regime does. Equally, regulatory regimes often evolve from corporate governance. An executive director has a dual role: accountability for your part of the business, and leadership and direction of the company. As a director, your obligations and liabilities will be defined under law, but the board’s collective duties and responsibilities are set out by corporate governance codes with guidance that explains the collective board expectations.

There is also a growing body of research and evidence that indicates where board failure has been at the heart of company failures. More importantly it shows us what an effective board looks like, and how it relies on the effective contribution of each and every director: executive or non-executive.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery/Face to Face

 **CPD:** Recognised

Who should attend

Managers, team leaders and all those seeking to expand their skills on the topic. Wherever you are on your career journey, developing and maintaining your personal and professional skills helps to ensure you continue to grow and thrive.

Key Topics Covered

- The nature and sources of risk: risk as part of strategy.
- Risk universe and classes/types of risk,
- The board's role: setting policy, strategy, and appetites, with meaningful appetites, thresholds and tolerances.
- Risk framework and process: identification, quantification, mitigation, and monitoring.
- What is corporate governance?
- The role and duties of directors: fiduciary duty.
- The board: role, structure, leadership, and operation.
- Regulatory: aligning individual accountability with collective responsibility.
- 'Matters Reserved' business model, culture and strategy, risk framework and risk appetites.
- The element of board effectiveness: essential dynamics, relationships, behaviours, and competences.

Learning Outcomes

By the end of this workshop delegates will be able to:

- Summarise the basic principles of risk management, and the board's specific responsibilities.
- Describe the fundamental framework, process, and tools of risk management.
- Outline the essential combination of risk management, governance and capital adequacy.
- Summarise corporate governance, and how the existing framework in the UK has evolved.
- Explain your statutory and legal obligations.
- Explore the purpose and role of the board, its structure, and the roles of board committees.
- Explore the dual role of the executive director and the relationship with NEDs.
- Outline what contributes to board effectiveness.

ESG Practice & Reporting

Description

Environmental Social Governance (ESG) is more than just ticking boxes. It's about making a difference for your business and our world. Creating sustained outcomes that drive value and fuel growth, whilst strengthening our environment and societies.

The aim of this module is to equip leaders with an in-depth understanding of ESG, its evolving importance to all of our key stakeholders and the growing influence it has on the continued success of our business activities. Leaders will consider each of the three pillars of ESG, reflecting on current and emerging trends before learning how to create an effective ESG strategy to implement ESG practice and reporting in an insurance organisation.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery/Face to Face

 **CPD:** Recognised

Who should attend

Managers, team leaders and all those seeking to expand their skills on the topic. Wherever you are on your career journey, developing and maintaining your personal and professional skills helps to ensure you continue to grow and thrive.

Learning Outcomes

By the end of this workshop delegates will be able to:

- Explain ESG, its origins, background, and history.
- Understand the three individual Environmental, Social and Governance pillars in detail.
- Explore current and emerging ESG trends and statistics.
- Understand how key stakeholders influence the importance of and our approach to ESG.
- Analyse the business risks, challenges and opportunities associated with implementing, or failing to implement a successful ESG Strategy.
- Identify what strong ESG looks like, including strategic focus, best practices and measuring impact.
- Learn how to create an effective ESG strategy for the whole business, including;
 - identifying ESG risk;
 - setting ESG goals and priorities;
 - choosing performance metrics;
 - developing quality improvement plans; and
 - implementing robust governance practices.
- Identify effective reporting for strategic decision making, external stakeholders and regulators.

Future of Insurance

Description

The advent of digital technologies such as generative Artificial intelligence and Machine learning is undoubtedly beginning to accelerate the digitisation for the insurance industry and will no doubt ensure that the future is an exciting one. In this one day interactive workshop we give an overview of some of the key themes effecting the future of insurance.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Face to Face

 **CPD:** Recognised

Who should attend

Brokers and underwriters who are seeking to broaden their understanding of the future of the insurance market.

Key Topics Covered

- The impact of Insurtech on the insurance market
- How digital technologies are being used to personalise and customise insurances
- Changes in distribution of insurance
 - Use of ecosystems
 - Embedded insurance
- Improving efficiency through increased automation
- Behaviour and usage based insurance models
- Impact of Generative Artificial intelligence and Machine learning
 - Uses
 - Ethical considerations
- New types of product
 - Parametric products
 - Usage based and on-demand insurance
 - Behavioral based insurance

Learning Outcomes

By the end of the workshop participants will be able to

- Outline the key trends in the global insurance market
- Describe the role of Insurtech firms in changing the landscape of the insurance market
- Identify how insurers and brokers are leveraging digital technologies to not only improve efficiencies but improve customer experience and financial protection

Introduction to Leadership

Description

To be a good leader you need to be able to do establish direction and influence and align others towards a common goal, motivating and committing them to action and making them responsible for their performance.

This workshop covers the principles of effective leadership and management, helping delegates understand the impact good leadership and management has on an organisation and how they themselves can lead, inspire and motivate others.

By exploring the fundamental responsibilities of leadership, participants gain insight into fostering effective team dynamics and motivating team members towards shared goals. They will acquire essential communication tools, explore motivational strategies, and gain valuable insights into team development processes.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

This workshop caters to managers, supervisors, and team leaders looking to refine their leadership skills and enhance team performance. The workshop will be highly interactive with delegate participation and engagement throughout. There will also be some pre-work for delegates to complete before the session.

Learning Objectives

• Session One

1. What is a Manager/Leader? - to establish the responsibilities of supervisors/team leaders
2. Stages of team development – John Adair and Bruce Tuckman
3. What Makes a Team? - to encourage delegates to think about the wider aspects of the role, how a team is made up of different personalities and how to use their individual strengths to the team's advantage.
4. Motivation - what motivation is and how to create a climate that encourages all the things that motivate us as individuals. How targets given in the right way can help motivate the individual and the team.

• Session Two

1. Coaching – What is it?
2. Essential Communication tools - looking briefly at the skills needed to be an accomplished coach
3. GROW – introduction to the GROW model of coaching
4. Setting Objectives - how to set SMART objectives and why they are vital
5. Feedback - giving and receiving and how vital feedback is to a team's development.
6. Skills Practice

Learning Outcomes

By the end of the workshop delegates will have a better understanding of:

- Define the essential responsibilities of team leaders/supervisors
- Outline the key elements of successful teams
- Outline the importance of motivation and how to apply it to their team
- Set SMART objectives
- Define the key skills required to be a successful coach
- Develop their team by giving constructive well thought out feedback

Leading and Developing People to Optimise Performance

Description

This full-day, interactive workshop provides a comprehensive overview of key financial and accounting principles in insurance. Topics include the insurance working capital cycle, key accounting concepts, premium mechanics, claims handling, and reinsurance treatment. Participants will explore P&L construction, balance sheet interpretation, and capital adequacy, with comparisons to the Solvency II framework. The workshop also introduces investment strategies and asset-liability matching, offering practical insights into liquidity and solvency management.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Face to Face

 **CPD:** Recognised

Who should attend

No matter your function, viewing the industry and your own firm through the lens of finance reveals the risks, dependencies and opportunities. Being able to understand where the numbers come from and the ultimate measures of business success brings immense career benefits.

Key Topics Covered

- Insurance working capital cycle
- The economic characteristics of insurance: sources of opportunity and risk?
- Key accounting labels, concepts and rules: the fundamental accounting challenge
- The mechanics of premium: written/earned, gross/net, unearned premium reserves
- Acquisition costs and operational expenses
- The mechanics of claims: paid, outstanding and IBNR,
- Unexpired risk reserves/ claims equalisation reserves
- The P and L impact of prior year development: Reserve release or IBNER?
- The treatment of reinsurance
- A brief introduction to investment considerations: types of assets and asset liability matching
- Constructing the P&L (technical and non-technical account) and interpreting the balance sheet
- Liquidity, solvency and capital adequacy
- Comparison with the Solvency II balance sheet

Learning Outcomes

- Identify the financial characteristics that make insurance distinct from other industries
- Describe the insurance cash flow cycle, and the main dependencies
- Explain main accounting rules and how they are applied to measurement and reporting
- Describe the key terms – the language of insurance finance
- Explain the financial treatment of the drivers of profit (or loss.....)
- Explore the crucial role of financial assets and investment income to the ultimate result
- Navigate and interpret the profit and loss/income statement and balance sheet/Statement of Financial Position
- Appreciate the requirement for solvency and capital adequacy, and what this means in practice

Leading & Managing Organisational Change

Description

Leaders must be able to navigate an organisation through strategic change. This will optimise an organisation's ability to remain competitive, react to the needs and expectations of stakeholders and respond to changing national and international markets. Despite this, many strategic leaders are ill-equipped to deliver organisational change. In fact, research conducted by McKinsey & Company has shown that 70% of change programmes fail to achieve their goals, largely due to employee resistance and a lack of management support.

The aim of this module is for leaders to understand the scope, context and complexity of leading strategic change. Leaders will understand how the application of analytical techniques, theories and models of change, and creative problem-solving can be used to equip them to lead strategic change with confidence. The module culminates in giving leaders the opportunity to develop a proposal to lead a strategic change.

Summary

-  **Duration:** 1-day workshop
-  **No of Attendees:** 12–16
-  **Format:** Virtual delivery/Face to Face
-  **CPD:** Recognised

Who should attend

Managers, team leaders and all those seeking to expand their skills on the topic. Wherever you are on your career journey, developing and maintaining your personal and professional skills helps to ensure you continue to grow and thrive.

Learning Outcomes

By the end of this workshop delegates will be able to:

- Discuss the scope, context and drivers for organisational change.
- Examine the potential impact of change in organisations.
- Critically appraise the complexities of leading strategic change
- Analyse the role of leadership in gaining the commitment of others to change.
- Identify and engage with stakeholders critical to achieving success.
- Examine theories and models for leading and managing strategic change.
- Develop a proposal for leading strategic change, including:
 - creation of a change plan;
 - selection of project management tools to manage change, risk and stakeholders.
 - practical methods of supporting individuals through change; and
 - methods of monitoring and evaluating progress and success.
- Reflect on how different approaches to leadership can be applied to deliver the strategy for change.

Leading Inclusively: EDI Strategies for Managers in Insurance (Managing equality diversity and inclusion)

Description

In today's diverse and evolving insurance profession, fostering Equality, Diversity, and Inclusion (EDI) is critical to driving business success and ensuring long-term sustainability. Senior managers play a pivotal role in shaping inclusive cultures that value diverse perspectives and create equitable opportunities for all employees.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

This workshop is suitable for Operational and Senior managers in the insurance industry who are responsible for leading teams, developing strategies and shaping organisational culture. It is ideal for those looking to enhance their leadership skills by integrating Equality, Diversity, and Inclusion (EDI) strategies into their management practices."

Learning Objectives

This one-day workshop, "Leading Inclusively: EDI Strategies for Senior Managers in Insurance," equips participants with essential EDI knowledge and strategies tailored to the unique challenges of the insurance sector. Covering key topics such as the business case for EDI, unconscious bias, inclusive leadership, and overcoming industry-specific challenges, this workshop blends theory with practical application through case studies, interactive exercises, and action planning. Participants will leave with actionable insights to foster an inclusive culture and lead their organisations toward greater equity and diversity.

- Understand the Strategic Importance of EDI: Learn how EDI drives business success and innovation within the insurance industry.
- Recognise and Mitigate Unconscious Bias: Explore how unconscious biases impact decision-making and develop strategies to address them.
- Develop Inclusive Leadership Skills: Gain insights into the characteristics and practices of inclusive leaders to foster a culture of belonging.
- Identify and Overcome EDI Challenges: Engage in problem-solving to address industry-specific EDI challenges and develop practical solutions.
- Create an EDI Action Plan: Develop a personalised plan with short-term and long-term goals to promote EDI within your team and organisation.

Learning Outcomes

- The Business Case for EDI in Insurance: Understanding how diversity, equity, and inclusion contribute to competitive advantage and business success.
- Unconscious Bias and Its Impact on Decision-Making: Identifying and mitigating biases that affect leadership and organisational outcomes.
- Inclusive Leadership Best Practices: Strategies for fostering an inclusive workplace culture at the senior management level.
- EDI Challenges in the Insurance Industry: Addressing barriers to EDI and exploring solutions through collaborative group work.
- EDI Action Planning: Creating a clear and actionable plan to implement EDI strategies within your organisation.

Managers as Coaches

Description

Coaching is an essential tool for leaders in achieving business goals

In an increasingly complex and challenging world of work, coaching skills are widely regarded as essential tools for managers wanting to unleash the potential of their teams. Effective coaching drives employee engagement and performance, directly supporting the achievement of business results.

This programme developed between the CII and Better Manager focuses on developing and practicing fundamental coaching skills for managers to support team development.

Managers as Coaches is an **8-week program**, which includes 4 x 90-minute virtual tutor-led sessions, which can help participants practice and master the 'coaching skills mindset' most associated with effective leadership.

At the end of the workshop, you will receive a certificate of attendance from the CII.

Summary

 **Duration:** 8 weeks

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

Managers, team leaders and all those seeking to expand their skills on the topic. Wherever you are on your career journey, developing and maintaining your personal and professional skills helps to ensure you continue to grow and thrive.

Learning Objectives

The programme is broken down into four sections:

1. INTRODUCTION TO COACHING – WHY IS THIS IMPORTANT?

Inside this session, participants will:

- Identify key connections between coaching and management effectiveness.
- Outline benefits and impact of skillful coaching for managers and team members.
- Explore techniques to enhance listening skills.
- Observe and practice coaching technique to ensure back-to-work readiness in applying technique.

2. TACTICAL COACHING SKILLS – BUILDING YOUR COACHING TOOLBOX

Inside this session, participants will:

- Explore fundamental coaching principles to enhance their people management skills.
- Develop three new powerful coaching techniques designed to enhance communication skills through coaching conversations.
- Observe and practice coaching techniques to ensure back-to-work readiness in applying techniques.

3. LEVERAGING COACHING SKILLS FOR PERFORMANCE MANAGEMENT

Inside this session, participants will:

- Discover how to initiate and engage in meaningful conversations that establish expectations, cultivate accountability and champion team members.
- Develop three new powerful coaching techniques designed to further enhance communication skills.
- Observe and practice coaching techniques to ensure back-to-work readiness in applying techniques.

4. LEVERAGING COACHING FOR ENGAGEMENT

Inside this session, participants will:

- Discover coaching techniques designed to unlock engagement and productivity.
- Develop new coaching technique designed to cultivate personal growth and development.
- Bring it all together through coaching practice to ensure back-to-work readiness in applying all coaching methods.

Learning Outcomes

By the end of this workshop delegates will gain the following:

- An objective assessment of their individual manager strengths and development areas.
- The advanced listening skills most commonly adopted by high-performing leaders.
- A toolkit of coaching techniques suitable for any working environment.
- Improved communication skills.
- Mastery of impactful career development/growth conversations with team members.

Managing Difficult Conversations / Situations

Description

Difficult conversations have the potential to strengthen or weaken a business relationship and need to be handled with skill and care. Navigating challenging conversations is integral to fortifying business relationships, requiring finesse and expertise.

The live webinar will be highly interactive with delegate participation and engagement throughout.

Summary



Duration: 1/2 day workshop



No of Attendees: 12–16



Format: Virtual delivery



CPD: Recognised

Who should attend

This workshop will aim to help you become more confident in managing challenging conversations.

This workshop is designed to equip participants with the essential skills to adeptly manage complex dialogues, ensuring that business relationships remain robust, trust endures, and respect is earned.

Learning Outcomes

By the end of this **half-day** online interactive Training workshop delegates will be able to understand:

- Why are some situations/conversations difficult
- Understanding the root cause of conflict and challenging behaviour
- Reading and using body language accurately
- Separating the person from the problem
- Avoiding taking things personally, remaining calm/composed, in control and professional
- DESC technique

Managing & Leading Teams To Achieve Success

Description

When individuals and teams are managed well, organisations thrive and staff satisfaction increases. This workshop provides an in-depth understanding of key theoretical and practical approaches to leading and managing teams effectively. Managers will identify the techniques used to monitor and manage individual and team performance, assess current and future requirements for their teams and identify approaches to close gaps and drive results that exceed expectations.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery/Face to Face

 **CPD:** Recognised

Who should attend

Managers, team leaders and all those seeking to expand their skills on the topic. Wherever you are on your career journey, developing and maintaining your personal and professional skills helps to ensure you continue to grow and thrive.

Learning Outcomes

By the end of this workshop delegates will be able to:

- Discuss the management and leadership concept.
- Explore how management and leadership practice has evolved, discussing what lessons from the past we should keep and which practices are now outdated.
- Assess how theoretical models can be applied to different contexts and situations.
- Identify practical approaches for effective team management and leadership.
- Examine the current and future requirements of individuals and teams
- Evaluate methods of monitoring and managing team performance.
- Discuss how to develop team capabilities to close performance gaps and drive results.
- Assess strategies for enabling and maintaining a high-performance team.

Managing Projects to Achieve Results

Description

An ever-developing field used to achieve strategic objectives, project management is used by organisations large and small alike to improve process efficiency, implement new technologies, launch new products/services and tackle ongoing operational issues and risk. With such an important role to play in organisational success, the ability to manage projects has become a vital skill for all managers.

This two-day workshop focuses on the knowledge and skills required to manage projects successfully and overcome problems and challenges. Managers will learn how to win support for a strategic project they need to run, the proven methods and tools for planning tasks and activities and develop the skills they require to implement and manage the project itself. In addition, the workshop approaches how to build key stakeholder relationships, as well as monitoring progress and reporting on project outcomes.

Summary



Duration: 2-day workshop



No of Attendees: 12–16



Format: Virtual delivery/Face to Face



CPD: Recognised

Who should attend

Managers, team leaders and all those seeking to expand their skills on the topic. Wherever you are on your career journey, developing and maintaining your personal and professional skills helps to ensure you continue to grow and thrive.

Learning Outcomes

By the end of this workshop delegates will be able to:

- Discuss project management's role in delivering organisational strategic objectives.
- Know how to use a business case to win support for a strategic project.
- Assess the process for initiating projects.
- Learn the tools and techniques to plan and manage projects in different contexts and situations.
- Analyse who the key stakeholders are in relation to a project and the techniques used to work collaboratively with them to achieve project objectives.
- Identify risks that could lead to project failure and know how to mitigate or manage them.
- Explore methods for monitoring progress and reporting project outcomes.
- Know how to close a project, including project evaluation, lessons learned and the redistribution of resources and projects teams.

Managing Risk

Description

The ability to effectively lead strategic risk management is essential to safeguard an organisation's prosperity and reputation. Ultimately, leaders must know how to develop and lead risk management in a manner that not only reacts to organisational needs but contributes to organisational success.

The aim of this module is for leaders to develop an in-depth understanding of strategic risk management. Leaders will critically appraise strategic risk within an organisational context.

They will assess strategies for risk management and the leadership skills to lead risk initiatives successfully. Ultimately, leaders will be given the opportunity to develop a framework to deliver a risk strategy in an organisational context.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery/Face to Face

 **CPD:** Recognised

Who should attend

Managers, team leaders and all those seeking to expand their skills on the topic. Wherever you are on your career journey, developing and maintaining your personal and professional skills helps to ensure you continue to grow and thrive.

Learning Objectives

The aim of this module:

- Leaders to develop an in-depth understanding of strategic risk management.
- Leaders will critically appraise strategic risk within an organisational context.
- They will assess strategies for risk management and the leadership skills to lead risk initiatives successfully.
- Ultimately, leaders will be given the opportunity to develop a framework to deliver a risk strategy in an organisational context.

Learning Outcomes

By the end of this workshop delegates will be able to:

- Critically appraise strategic risk to an organisational, its customers and stakeholders.
- Discuss the governance of risk within organisations.
- Examine categories of risk used within different organisational contexts.
- Explore strategies for managing risk in an organisations, including: processes for identifying, assessing and ranking business risk; the process for managing a business risk; approaches to mitigate business risk; methods for implementing business risk management; and methods for reporting identified risks to stakeholders.
- Critically appraise the leadership skills for strategic risk management.
- Propose a risk management framework to deliver strategic objectives.
- Explore strategies for managing risk in an organisations, including
 - Process for identifying, assessing and ranking business risk
 - Process for managing a business risk
 - Approach for mitigating business risk
 - Propose methods for implementing business risk management
 - Propose methods for reporting identified risks to stakeholders

Performance Measures & KPIs in the Insurance Profession

Description

Performance measurement is a fundamental activity for any business: part of governance and part of risk management, but you need to measure the right things if you want an effective "Executive dashboard".

We are in a financial business so we need to understand the core financial measures, which means we need to revise the industry financial dynamics and budget process so we understand the activities that generate the numbers in the first place, and what the measures will tell us about health of the business. The most important is profit – which is also the most difficult because of the issue of timing: when do you recognise "profit".....? This is especially true of long term/life business.

A business should identify both lagging and leading Key Performance Indicators: it's not enough to know where you have come from, you need indicators of the likely direction of travel. Whilst insurance concentrates on financial and other quantitative indicators, we should be ready to look beyond the numbers.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery/Face to Face

 **CPD:** Recognised

Who should attend

Managers, team leaders and all those seeking to expand their skills on the topic. Wherever you are on your career journey, developing and maintaining your personal and professional skills helps to ensure you continue to grow and thrive.

Key Topics Covered

- The insurance "positive" cash flow cycle
- The mechanics: premium (written v earned), reinsurance, claims, acquisition costs and management expenses
- Net or gross?
- Setting the targets: the budgeting Process
- Interpreting the profit and loss/income statement and balance sheet
- How and when profit is recognised in life and non-life?
- The key ratios: RoI/RoC/RoE, the combined ratio, ultimate loss ratio, operating ratios, solvency capital margin
- For a life business, what is embedded value and what does it tell us?
- Key Performance Indicators AND Key Risk Indicators
- The "non-financial" indicators of conduct and culture: leading indicators. What else would you consider?

Learning Outcomes

By the end of this workshop delegates will be able to:

- Describe the financial characteristics and cash flow cycle that make insurance unique.
- Explain the financial treatment of insurance assets and liabilities.
- Navigate the main financial statements.
- Summarise the basic budgeting process: the source of your KPIs.
- Describe the key insurance ratios and their use.
- Outline the other Key Performance Indicators an insurer can employ.

Presentation Skills

Description

This online session will aim to help you become a natural online presenter.

Presenting online has today become an important skill required for salespeople, managers, customer service people and many other knowledge workers. Whether you are based at home or in the office, the professional and relaxed use of online software to present yourself cannot be underestimated.

Summary



Duration: 2 half-day workshop



No of Attendees: 12–16



Format: Virtual delivery



CPD: Recognised

Who should attend

This session is suitable for anyone in the financial services sector who uses online workshops in their business and need to present seamlessly, ensuring audience engagement and commitment.

Skills for salespeople, team leaders, managers, advisers who talk with clients over online video.

Learning Outcomes

- Equip you with the knowledge and techniques to deliver engaging and persuasive video presentations.
- Demonstrate leveraging body language, facial expressions, and voice modulation for effective virtual communication.
- Teach you how to manage presentation anxiety and deliver presentations with poise and confidence.
- Provide you with practical tips and strategies for optimising their video conferencing setup and equipment.
- Guide you in creating a professional and polished presentation environment for your video engagements.

Professional Sales Skills

Description

This one-day online workshop, will help you to develop and and refine sales-focused skills to enable customers to move towards addressing their needs and achieve good outcomes. The skills you will learn will help ensure consumer understanding and support and are therefore aligned with the requirements of the new Consumer Duty regulations.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 15

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

This Workshop is suitable for someone new to the insurance, advisory business or someone who wants to refresh themselves as they are embarking on an insurance selling model.

Learning Outcomes

This workshop, will be broken down into the below sessions:

Session One

Sales Cycle and Customer prospecting

- The sales cycle of the 21st century, helping your customer to buy rather than being sold to
- Prospecting techniques, sales pipeline management, securing appointments by phone
- The referral engine

Session Two

Selling Foundations

- Sales foundations – the personal inner game and the value proposition you promote with customers.
- Maximising the first 90 seconds to build a positive first impression
- The 3 elements of trust – when and how to ensure you nail these 3 elements very early on in the process

Session Three

Fact finding Success

- Fact finding success.
- The Lifeline soft needs tool – a powerful, yet simple tool to aid a discussion about the client's life, past, present and future, to explore their goals and ambitions for themselves.
- How to ensure you listening with perfection
- Earmarking and revealing gaps, helping them to make a buying decision

Session Four

Presenting, Closing and Objection Handling

- Presenting a tailored solution to suit the customer's needs
- Reading customer buying signals / requirements
- Pre-empting objections and handling customer reservations

Quality Management & Continuous Improvement

Description

Effective quality management is critical to meeting stakeholder needs and expectations, developing trust and reputation. It impacts on profitability, processes and procedures and the achievement of strategic objectives. Quality is not something that occurs by chance. It is reliant on strategic and operational planning and the commitment and drive by professional managers, leaders, teams and individuals to make it a success.

The aim of this unit is to enable professional managers and leaders to understand the rationale and approaches to quality management. Critically, the workshop focuses on how quality and continuous improvement can be instilled into all aspects of working practice.

Summary



Duration: 1-day workshop



No of Attendees: 12–16



Format: Virtual delivery/Face to Face



CPD: Recognised

Who should attend

Managers, team leaders and all those seeking to expand their skills on the topic. Wherever you are on your career journey, developing and maintaining your personal and professional skills helps to ensure you continue to grow and thrive.

Learning Outcomes

By the end of this workshop delegates will be able to:

- Evaluate the scope and purpose of quality management within organisations.
- Analyse organisational structures for managing quality.
- Examine the influence of stakeholders in quality management.
- Analyse the impact of quality management systems on an organisation's activities.
- Discuss how quality management can be developed to achieve strategic objectives in an organisational context.
- Evaluate the tools and techniques used in quality management within an organisational setting.
- Develop a proposal to lead quality management at an operational level.
- Consider how individuals and teams can be supported to instil the principles of quality and continuous improvement into all aspects of working practice.

Reinsurance, Insurance & Climate Change and the Future of Insurance

Description

This module is split into three sections. The first section introduces delegates to the basics of reinsurance. We will then take a look at climate change and the ramifications of climate change for insurers and then we will look at the future of insurance and the growing use of insurtech in relation to insurance placement and claims handling.

Summary

-  **Duration:** 1-day workshop
-  **No of Attendees:** 12–16
-  **Format:** Virtual delivery/Face to Face
-  **CPD:** Recognised

Who should attend

Managers, team leaders and all those seeking to expand their skills on the topic. Wherever you are on your career journey, developing and maintaining your personal and professional skills helps to ensure you continue to grow and thrive.

Introduction to Reinsurance

The first part of the module gives an overview of the part reinsurance plays and why it is important. Delegates will also be introduced to the types of reinsurance that can be purchased and how each reinsurance type operates.

This section covers the following:

- Why is reinsurance important?
- The reinsurance market.
- Proportional and non-proportional reinsurance.
- The characteristics of facultative and treaty reinsurance.
- Aggregate excess of loss.
- Stop loss.
- Underwriting and rating considerations.
- The legal principles of reinsurance.

Learning Outcomes

By the end of this section delegates will be able to:

- Understand the need for reinsurance and its use by insurers.
- Have a basic understanding of the reinsurance market.
- Demonstrate the difference between proportional and non-proportional reinsurance.
- Have an understanding of the characteristics of facultative, treaty and contract methods of reinsurance.
- Have a basic understanding of the legal principles of reinsurance and the importance of information about the original risk to the underwriter.

Insurance and Climate Change

This module looks at climate change and the implications for insurers and their clients.

This section covers the following:

- The impact of climate change.
- Climate change and risk management.
- Climate change initiatives.
- Climate change risk finance.
- The UK insurance regulators' expectations.
- The effect of climate change for insurers and their clients.

Learning Outcomes

By the end of this section delegates will be able to:

- Understand the impact of climate change for insurance organisations and policyholders.
- Understand climate change and catastrophe.
- Have a basic understanding of climate change risk management.
- Have an understanding of climate change initiatives.
- Have a basic understanding climate change and risk finance.
- Have a basic understanding of the UK regulators' expectations of insurers.
- Understand the effects of climate change with insurance organisations.
- Understand the effects of climate change on insurance clients.

The future of Insurance

The last part of this module looks at the latest technological advances relating to insurance.

This section covers the following:

- What is AI and machine learning?
- The use of big data.
- Insurance claim automation.
- The use of AI and property risk.
- The application of insurtech in regard to claims handling.
- New opportunities.

Learning Outcomes

By the end of this section delegates will be able to:

- Understand the future of insurance.
- Understand AI and its place in the assessment of risk.
- Understand insurance automation in regard to the claims process.
- Have an understanding of the future of big data.
- Have a basic understanding of insurtech in relation to climate change.
- Understand how insurtech is disrupting the insurance market.

Skills when Dealing with Vulnerable Clients

Description

This online workshop will aim to help you to understand and develop your communication skills when dealing with vulnerable clients.

Advanced skills to engender trust, step into the shoes of your vulnerable customers, encourage a conversational fact-find and coach their challenges in their time of need.

Summary



Duration: 2 half-day workshop



No of Attendees: 12–16



Format: Virtual delivery



CPD: Recognised

Who should attend

This Workshop is suitable for anyone in the financial services sector, who engages with customers and clients online, on the phone or face-to-face.

It has specific value to frontline advisers in the insurance and financial services sector - Mortgage, protection, financial advisers, and later-life lending advisers.

Learning Outcome

- The workshop will help you master your ability and confidence in handling particularly vulnerable customers by using some of the latest communication methods and techniques to build empathy, trust and engagement.
- A deep dive into the Neuro-Linguistic Programming (NLP) Toolbox - an ingenious collection of communication and people skill tools to enhance client interaction. Factfinding, rapport building and listening to a client who has recently been through a traumatic life event, is always a challenge for us, who may never have experienced such trauma themselves.

Solvency II: An Interactive Briefing

Description

Solvency II brings more demanding capital adequacy and aligns it with wider enterprise risk management. It will have far-reaching consequences for all insurers. Originally proposed in 2003, in the wake of the Sharma report into insurer failures, full implementation across Europe didn't take place until 2016. No longer part of the EU, the UK still follows Solvency II but is proposing changes to the capital rules. Nevertheless the principles of risk-based capital management, underpinned by effective governance, will remain.

Summary

 **Duration:** 1 half-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

This is a high-level introductory briefing for staff in insurance companies who have not yet been involved but who need to understand how it affects the business models, decision making, reporting and day to day activity.

Key Topics Covered

Solvency II :

- Purpose, objectives, rationale and responsibilities
- Principles: a balance sheet approach to risk based capital allocation
- Key Components: the 3 pillar structure, Solvency Capital Requirement (SCR), Minimum Capital Requirement (MCR), capital tiers and admissible assets, Own Risk Solvency Assessment (ORSA), the concept of Value-at-Risk (VaR), standard formula v internal models
- Risks: key financial risk classes and identifying, categorising and quantifying other operational risks.
- Impact on systems of governance and reporting

Learning Outcomes

By the end of the briefing, you will be able to:

- explain the background to Solvency II and its objectives
- describe its principal components
- demonstrate the application of Solvency II using a simple insurance balance sheet
- explain the principal risk classes
- suggest the operational issues created by different business models
- appreciate the current approaches being adopted across the industry
- explore the implications of a greater focus on risk based capital management

Strategic Approaches To Equality, Diversity & Inclusion

Description

There is a moral, financial and legal business case for excellent practice in equality, diversity and inclusion in an organisational context. Ensuring it is led effectively at a strategic level requires knowledge, understanding, skills, behaviours and tenacity to keep pace with the momentum of change. Strategically, equality, diversity and inclusion matters. An understanding of the topic not only impacts on the success of strategic objectives but it mitigates risk and enables a culture of support and wellbeing to thrive.

The aim of this module is to enable leaders to develop an in-depth understanding of equality, diversity and inclusion at a strategic level. Leaders will have the opportunity to critically assess structural inequality within an organisational and societal context. They will discuss approaches to comply with legal and good practice requirements and to appraise the influence of equality, diversity and inclusion on strategic objectives.

Summary

-  **Duration:** 1-day workshop
-  **No of Attendees:** 12–16
-  **Format:** Virtual delivery/Face to Face
-  **CPD:** Recognised

Who should attend

Managers, team leaders and all those seeking to expand their skills on the topic. Wherever you are on your career journey, developing and maintaining your personal and professional skills helps to ensure you continue to grow and thrive.

Learning Outcomes

By the end of this workshop delegates will be able to:

- Assess structural inequality within an organisational and societal context.
- Discuss approaches to legal and good practice requirements for equality, diversity and inclusion in an organisational context.
- Critically appraise the influence of equality, diversity and inclusion on the strategic objectives of an organisation.
- Present the business case for good practice in equality, diversity and inclusion.
- Analyse the role and responsibilities of strategic leaders and managers in relation to equality, diversity and inclusion.
- Select and appraise data and information to inform strategic priorities of an organisation.
- Develop strategic priorities for equality, diversity and inclusion within an organisational context.
- Develop a strategy to embed strategic priorities for equality, diversity and inclusion within an organisation.
- Assess approaches for managing individuals and teams which lack commitment to equality, diversity and inclusion.

Strategic Management & Planning

Description

“An effective board establishes a sustainable business model and a clear strategy consistent with it”

PRA Corporate Governance and Board Responsibilities

A clear and articulated business model, well thought out strategy and robust governance are not just regulatory 'box ticking exercises' but a commercial imperative regardless of industry. This module introduces the business model, strategy creation and business planning.

In insurance this is often an underdeveloped skill: often never learned before you have to do it for real as a board director, and then learning 'on the job'. This module offers the fundamental processes and stages as a spine from which hang the practical 'doing'. The best practice is neither scientific nor formulaic but, whatever approach is chosen, this can be the starting point.

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery/Face to Face

 **CPD:** Recognised

Who should attend

Managers, team leaders and all those seeking to expand their skills on the topic. Wherever you are on your career journey, developing and maintaining your personal and professional skills helps to ensure you continue to grow and thrive.

Key Topics Covered

- The planning process: business model to strategy to business plan.
- Strategic decision making.
- The process of strategy.
- Strategic analysis: internal and external.
- Risk considerations and risk appetite alignment.
- Objectives, key performance indicators and critical success factors.
- Preparing a structured business plan which recognises the needs of all the stakeholders and the current business model.
- Regulatory climate: conduct, governance and culture.
- Handling uncertainty and contingency planning.
- Diversification, innovation, mergers and acquisitions.
- Implementing the business plan.
- Developing a business plan.
- Launching a business plan.
- Monitoring and managing the causes of strategic drift.

Learning Outcomes

By the end of this workshop delegates will be able to:

- Explain the vital role of the business model and its link with strategy creation.
- Apply the process of strategy creation and strategic analysis.
- Identify external and internal factors affecting strategy, and assess business risk.
- Outline the strategic options available to businesses, e.g. mergers/acquisitions/networks.
- Describe the importance of business planning and the key components of a business plan.
- Outline the process for launching and monitoring a business plan.

The Future of Risk Management

Description

The world of risk and risk management is always changing and in this one day interactive workshop we examine some of the risks that are exercising the minds of risk managers within organisations and consider how the insurance industry and help our customers manage those risks

Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Face to Face

 **CPD:** Recognised

Who should attend

Brokers and underwriters who are seeking to broaden their understanding of risk management.

Key Topics Covered

- What risks are organisations most concerned about in 2024
- Key principles of risk management required to manage the risks of today and the future:
- Climate risk change risk and risk management
- Natural resources and biodiversity risk
- The changing nature of cyber risk and risk management including data privacy
- Risks related to the use and application of artificial intelligence
- Risks to individuals and organisation of social media
- Managing the increasing reputational risks
- Supply chain risks in an era of geopolitical instability
- How data analytics and Artificial intelligence and behavioural science can be applied in risk management

Learning Outcomes

By the end of the workshop participants will be able to

- Outline the key risks organisation are most concerned with in 2024
- Identify the risk management strategies which can be used to manage the key risks of the future
- Describe how the art and science of risk management will change to manage changes in the risk environment
- Describe how the insurance market can help organisations effectively manage the risks of the future

Transformational Leadership & Cultural Change

Description

The role of the 21st-century leader is to provide clear and compelling direction which empowers the team and encourages engagement and team cohesion in order to meet targets, deadlines and organisational expectations. This can only be achieved by leaders who are highly emotionally intelligent and who understand and are committed to the skills and techniques required to get the best from themselves and their team. Whilst leadership could be described as an art rather than a list of things to do, the ability to trust others and be trustworthy is high up on the list of attributes. Before the role of leadership can be explored, the subject of organisational culture will be defined and discussed along with how the organisational culture can define how leaders operate and how change is managed at a process and people level.

Summary



Duration: 1-day workshop



No of Attendees: 12–16



Format: Virtual delivery/Face to Face



CPD: Recognised

Who should attend

Managers, team leaders and all those seeking to expand their skills on the topic. Wherever you are on your career journey, developing and maintaining your personal and professional skills helps to ensure you continue to grow and thrive.

Key Topics Covered

- Organisational culture and how culture defines leadership.
- Mission and vision statements – the benefits and purpose.
- The role and function of the 21st-century leader.
- Incisive and ethical leadership.
- Leading and managing change.
- Using proven models to effectively lead organisational change.
- Strategies for communicating and supporting people through change.

Learning Outcomes

By the end of this workshop delegates will be able to:

- Describe what organisational culture is.
- Create a mission and vision statement for their organisation.
- Understand how context impacts 21st-century leadership.
- Describe inclusive and ethical leadership.
- Explain what organisational change is and why change often fails.
- Describe the key change and transformational models and techniques.

Understanding Insurance Finance

Description

Finance for non-finance professionals!

This live on-line interactive webinar, spread over two half days, is an antidote to the mystique that surrounds finance! It introduces the concepts, dynamics and the jargon of insurance finance. It demonstrates how the basic financial principals still apply to insurance, but highlights where it is unique.

In a world where economic volatility will test the resilience of insurance companies, prudential management, capital adequacy and financial competence are on the agenda. This is prompting a stronger and widespread desire for every part of the business to "understand the numbers", especially the industry's financial exposures and the elements that contribute to profit (or loss) and capital adequacy

Summary

 **Duration:** 2 half-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

Who should attend

No matter your function, viewing the industry and your own firm through the lens of finance reveals the risks, dependencies and opportunities. Being able to understand where the numbers come from and the ultimate measures of business success brings immense career benefits.

Learning Outcomes

- Identify the financial characteristics that make insurance distinct from other industries
- Describe the insurance cash flow cycle, and the main dependencies
- Explain main accounting rules and how they are applied to measurement and reporting
- Describe the key terms – the language of insurance finance
- Explain the financial treatment of the drivers of profit (or loss.....)
- Explore the crucial role of financial assets and investment income to the ultimate result
- Navigate and interpret the profit and loss/income statement and balance sheet/Statement of Financial Position
- Appreciate the requirement for solvency and capital adequacy, and what this means in practice

Virtual Reality (VR) Workshop : Supporting Clients in Vulnerable Circumstances

Description

Empowering financial futures: a virtual reality experience supporting clients in vulnerable circumstances.

This in person workshop, delivered over a half-day, will aim to support you and your team to develop their soft skills and general awareness when dealing with clients in vulnerable circumstances. The workshop will include a virtual reality (VR) experience, with case studies.

Summary

 **Duration:** 1/2 day workshop

 **No of Attendees:** 12–16

 **Format:** Face to Face

 **CPD:** Recognised

Who Should Attend

This Workshop is suitable for Advisers and Support teams and anyone in the financial services sector, who engages with customers and clients.

Learning Objectives

- Understand the needs of vulnerable clients.
- Increase your skills and capability for identifying and recording vulnerability.
- Increase empathy & soft skills.
- Learn to pre-empt foreseeable harm or client disadvantage.
- Overview of FCA vulnerability observations and consumer duty focus.
- Vulnerability virtual reality role play and discussion
- Vulnerability case study including self-assessment.
- Exploring your firm's awareness and building your plan utilising support from across the profession.
- Digital legacy planning and the art of Dostadning (how *digital legacy planning* can be incorporated into the gentle *art* of Swedish death cleaning)

Skills when Dealing with Vulnerable Clients

Description

This online workshop will aim to help you to understand and develop your communication skills when dealing with vulnerable clients.

Advanced skills to engender trust, step into the shoes of your customers, encourage a conversational fact-find and coach their challenges in their time of need.

Summary

 **Duration:** 2 half-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery/Face to Face

 **CPD:** Recognised

Who should attend

This workshop is ideal for anyone in financial services who interacts with customers online, by phone, or in person, with particular value for frontline advisers in insurance, mortgages, protection, financial advice, and later-life lending.

Key Topics Covered

- The challenge of vulnerable customers, who they are, what's their story. The marketplace, the FCA's definition and Consumer Duty and why we need to be exceptional in the way we handle them
- Steps to ascertain who is and isn't a vulnerable customer – your own firm's definitions
- Understanding their point of view. Appreciating the three positions of empathy, the perceptual positions
- Stepping into other's shoes, finding out what makes them tick and tips to gain an empathic understanding of their views and feelings
- Coaching concepts to help change your mindset around the conversation. Understanding the coach's spectrum to be able to "pull" the customer to solve their challenges, not "push"
- How to be authentic and to match the customer's state of mind and personality to encourage commitment
- The secrets to building trust lay the foundations for a conversational fact-find
- The freestyle concept of fact-finding – practice and mastery
- An MOT of your vocal skills if phone or video is being used. Applying attention to your vocal cosmetics to engender engagement with your customer
- Types of questions and the do's and don'ts of conversational questions
- Softening your questions and encouragement techniques
- Listening mastery – MAP technique to remove premature thinking, solution'eering and giving advice

Learning Outcomes & Objectives

- The workshop will help you master your ability and confidence in handling particularly vulnerable customers by using some of the latest communication methods and techniques to build empathy, trust and engagement.
- A deep dive into the Neuro-Linguistic Programming (NLP) Toolbox - an ingenious collection of communication and people skill tools to enhance client interaction. Factfinding, rapport building and listening to a client who has recently been through a traumatic life event, is always a challenge for us, who may never have experienced such trauma themselves.

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