

CII Broker Academy

UK Face-to-Face Broker Training Directory

Quarter One 2015



working in partnership with:



Insurance Broking Faculty |  CII

UK Face-to-Face Broker Training Directory

Quarter One 2015

The Broker Academy's UK training programme delivers a mix of targeted technical, business and soft skills courses at 15 locations across the UK.

Conceived and developed following consultation with brokers, courses deliver a stimulating and rewarding learning environment to sharpen broking skills and enhance career potential.

Courses are delivered by leading market practitioners who share first-hand experience of the issues facing today's brokers.

The UK wide training programme delivers high-quality training at affordable prices, with a full-day's training from only £120 for CII members.

This is what our customers think...

“ thoroughly enjoyable course, excellent and knowledgeable trainer ”

Professional Indemnity Insurance
– Intermediate

“ the time spent on the course was very productive and it was money well spent ”

Sales Skills for Account Executives

“ made what was a frightening subject interesting and easy to understand ”

Business Interruption Insurance
– Advanced

To book or find out more

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Additional options

In addition to our public course options Broker Academy Training also offers:

In-house delivery

Any of our courses can be delivered ‘off the shelf’ to teams, or we can tailor course content to meet your specific needs. Delivery can take place at any of our training locations across the country, or at your own premises, saving on travel expenses and reducing the time staff spend away from the office.

Bespoke course development

We can work with you to design a training solution tailored to the needs of your business, whether it’s an adapted scheduled course or a completely new course. Our systematic approach covers scoping, creation and delivery, right through to evaluation.

Contacting Broker Academy Training

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London courses

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Application of insurance principles

CPD 6
CII Scheme Hours

Overview

This course provides an overview of the development of the insurance market and the necessary historical perspective to understand current practice. It will provide an insight into the key issues facing the market today and into the future.

Programme

- Risk and insurance
- The general nature of insurance
- The insurance market
- Types of insurance cover
- Documentation
- Legal aspects of insurance.

Learning outcomes

- Obtain a broad knowledge of the recent developments in insurance
- Understand the different insurance products available
- Gain an essential perspective of current market practices.

Who should attend?

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

One day course

Date
27 Mar
Venue
London
Cost
£135 members £160 non-members

Advanced business interruption insurance

CPD 6
CII Scheme Hours

Overview

This course is designed to develop delegates' knowledge of business interruption insurance. This intensive and highly interactive course is designed to provide an in-depth knowledge of this class of business. Using a mixture of lectures and practical exercises, delegates develop solutions to some of the more complex issues that arise today in the business interruption insurance market and then discuss the effects of the solutions they propose.

Programme

- Calculating gross profit – some issues, considerations and pitfalls
- Depreciation – current position, wording amendments that brokers should request/be aware of
- Suppliers extensions – calculating limits, defining suppliers
- Outsourcing – how to ensure policy covers adequately
- Wide area damage – position after Orient Express Hotels v General 2010 decision
- Fines and penalties – variation in extension wordings, dealing with no contractual commitments
- Definition of indemnity period – damage or interference?
- Indemnity periods – how to assess the correct MIP
- Flexible limit of loss policies
- Duty of brokers to explain gross profit – Arbory v West Craven Services 2007
- Non-standard extensions /clauses – e.g. loss of attraction, new business, loss of interest, option to convert to output, unreasonable delay.

Learning outcomes

- Understand the issues surrounding the underwriting and claims of business interruption risks
- Gain an awareness of recent important cases
- Gain up-to-date knowledge of example wordings and their issues.

Who should attend?

This course has been designed for delegates with previous involvement in business interruption insurance.

One day course

Date
21 Jan
Venue
London
Cost
£175 members £195 non-members

Claims handling

CPD 6
CII Scheme | Hours

Overview

This course will provide valuable background knowledge into claims handling.

Programme

- 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.

Learning outcomes

- Understand the basic principles of claims handling.

Who should attend?

This course 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.

One day course

Date
16 Feb
Venue
London
Cost
£135 members £160 non-members

Commercial insurance

CPD 6
CII Scheme | Hours

Overview

This course provides an overview of the development of the commercial insurance market and the necessary historical perspective to understand current practice. It will provide an insight into the key issues facing the market today and into the future. The programme is presented in an informal style with delegate participation encouraged via group discussion.

Programme

- The commercial insurance market
- Property insurance
- General principles
- Fire and special perils
- All risks
- Theft
- Money
- Goods in transit
- Business interruption
- Basic concepts
- Calculating a gross profit sum insured
- Basic perils insured
- The indemnity period
- Underwriting considerations and the basis of rating
- Liability policies
- How liability arises
- Employers' liability
- Public liability
- Product liability.

Learning outcomes

- Obtain a broad knowledge of commercial insurance
- Understand commercial insurance products and covers available
- Gain an essential perspective of current market practices.

Who should attend?

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

One day course

Date
27 Feb
Venue
London
Cost
£135 members £160 non-members

Commercial insurance packages

CPD 6
CII Scheme | Hours

Overview

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.

Programme

- Typical risks for which commercial package policies are appropriate
- Usual structure of the policies
- Underwriting considerations and information needed
- Main covers – property damage, business interruption, money, and liability (EL, PL, products)
- Optional covers – computers, goods in transit, fidelity guarantee and legal expenses
- Main policy conditions/exclusions
- Claims handling.

Learning outcomes

- Understand the benefits of a package policy approach
- Identify how customers could benefit from commercial insurance packages
- Describe the main underwriting and rating of commercial insurance packages
- Understand the usual policy structure and the variations which might be needed
- Understand the policy cover, conditions and exclusions of commercial insurance packages
- Be aware of the main considerations with commercial insurance claims.

Who should attend?

The workshop is ideal for those with less than 12 months experience of commercial insurance.

One day course

Date

19 Jan

Venue

London

Cost

£135 members
£160 non-members

Commercial motor insurance

CPD 6
CII Scheme | Hours

Overview

This workshop is designed to provide delegates with an overview of the different types of commercial motor policy. It will show how cover varies and how different types of rating are applied. Some prior knowledge of private motor insurance will be an advantage but no knowledge of commercial motor is needed.

Programme

- Understand the various types of commercial motor insurance cover available
- Be aware of the typical hazards and issues affecting motor fleets and the motor trade
- Be aware of the rating of commercial motor policies and the alternative rating for fleets
- Understand how motor trade insurance is rated and the different covers provided
- Know how policy cover varies across the different types of commercial motor policy
- Know the effect of the MID on the motor trade
- Be aware of the ways claims are handled for these types of insurance.

Learning outcomes

- Differentiate between the various types of commercial motor policy and how they differ from private motor policies
- Understand how commercial policies are rated and assessed by insurers
- Be aware of the main differences in cover between commercial motor, motor fleet and motor trade insurance
- See how the MID affects the motor trade
- Be aware of claims handling issues for these types of cover.

Who should attend?

This course has been designed for those who wish to become more widely involved with various types of commercial motor insurance. No prior knowledge is needed but some previous experience of motor insurance would be useful.

One day course

Date

23 Feb

Venue

London

Cost

£135 members
£160 non-members

Commercial property insurance

CPD 6
CII Scheme | Hours

Overview

This course is designed to put commercial property insurance in context and to introduce delegates to the operation and principles of commercial property insurance.

Programme

- Exploring the reasons why customers buy commercial property insurance
- A useful study of a typical policy structure as an overview
- An outlining of policy cover and the main exclusions and restrictions
- The principles of underwriting and pricing and the differences between the two
- The factors involved in the assessment of commercial risks
- The principles of claims handling as applied to commercial property insurance
- Typical methods of investigation used in commercial property claims handling.

Learning outcomes

- Obtain a basic knowledge of commercial insurance
- Gain a basic understanding of commercial insurance products and covers available
- Demonstrate a basic understanding of the principles of underwriting commercial property insurance and the factors involved in the assessment of commercial risks
- Gain a basic understanding of the principles of claims handling in regard to commercial property insurance.

Who should attend?

This course has been designed for delegates with little or no previous involvement in commercial property insurance. A good grounding in insurance practices is desirable.

One day course

Date

12 Mar

Venue

London

Cost

£135 members
£160 non-members

Contract works insurance

CPD 6
CII Scheme | Hours

Overview

This course gives an overview of what contract works insurance is all about. Aimed as an introduction to the topic it looks at the key issues affecting policy cover and how to place and rate risks.

Programme

- Standard contract works cover
- Conditions and exclusions
- JCT Standard form of contract
- Legal considerations
- Placing and rating risks.

Learning outcomes

- Understand the various options for contract works insurance cover
- Show an understanding of key conditions and clauses affecting cover
- Differentiate between good and bad risks
- Develop an awareness of the key issues for underwriting cover
- Know the main optional extras that can apply.

Who should attend?

It is aimed at those new to contract works insurance but who have a basic knowledge of commercial property and liability insurance.

One day course

Date

09 Jan

Venue

London

Cost

£135 members
£160 non-members

Cyber risks insurance

CPD 6
CII Scheme Hours

Overview

Information technology continues to develop and this course looks at what cover is available to protect against the risks that can arise. No previous knowledge of the topic is required although an understanding of basic liability insurance would be useful.

Programme

- What are cyber risks?
- Who is exposed to them?
- Standard covers, conditions and exclusions
- Underwriting considerations for this type of business
- Claims issues relating to cyber cover.

Learning outcomes

- Identify typical customers and their needs for cyber risks insurance
- Describe typical policy covers and what is available
- State the information required for underwriters to make a pricing decision
- Understand key issues affecting claims resolution.

Who should attend?

It is aimed at those who want an improved knowledge of the fast growing cyber insurance market.

One day course

Date
10 Feb
Venue
London
Cost
£135 members £160 non-members

Demystifying insurance

CPD 6
CII Scheme Hours

Overview

This workshop will provide a comprehensive overview of the UK insurance market to those who work within it but do not need full technical knowledge.

Programme

- Where insurance came from
- The legal foundation of insurance
- How insurance is provided
- The documents insurance uses
- The main types of cover available
- The regulation and shared resources of the insurance market
- Underwriting in the insurance market
- Claims handling.

Learning outcomes

- Understand the essentials of insurance
- Speak to insurance professionals on equal terms
- See how the market works and how each part is vital to the whole.

Who should attend?

This workshop will suit delegates who have a non-technical role but who would benefit from having an overview of the UK insurance market.

One day course

Date
03 Feb
Venue
London
Cost
£135 members £160 non-members

Directors' and officers' liability insurance

CPD 6
CII Scheme | Hours

Overview

The course is aimed at delegates who already have an understanding of directors' & officers' liability insurance. It will be highly interactive as delegates will be given a series of exercises and case studies to reinforce their learning.

Programme

- 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

- Describe the duties of directors' and officers'
- Compare and contrast the potential personal liability of directors' and officers' in both the UK and USA
- Describe how recent legal developments may impact future claims exposure
- Outline how directors' duties and liabilities may differ in other jurisdictions
- Describe the principal benefits of a directors' & officers' liability policy
- Explain the principal extensions and exclusions which are usually included in a directors' & officers' policy
- Outline how directors' & officers' coverage dovetails with other liability coverage
- Identify the principal underwriting considerations which apply
- Identify the key features of directors' & officers' liability claims handling.

Who should attend?

Those who wish to extend their knowledge of insurance or to specialise in this class of business.

One day course

Date

12 Feb

Venue

London

Cost

£135 members
£160 non-members

High net worth

CPD 6
CII Scheme | Hours

Overview

This course looks at the extra benefits that build on to a normal household insurance policy to provide high net worth cover and how these affect acceptance and cost for the customer.

Programme

- Risk factors and underwriting considerations
- Policy covers, standard conditions and exclusions
- Risk management applicable to high net worth cover
- Handling high net worth claims.

Learning outcomes

- Define additional covers available under high net worth policies
- Understand key conditions and exclusions
- Underwriting considerations for high net worth cover
- Understand the importance of how high net worth claims are handled.

Who should attend?

It is aimed at those who have an understanding of household insurance and want to move up to handling high net worth clients.

One day course

Date

07 Jan

Venue

London

Cost

£135 members
£160 non-members

Household insurance

CPD 6
CII Scheme | Hours

Overview

This course looks at what household insurance covers and the issues to take into account when arranging a policy.

Programme

- What does it cover and why do customers buy it?
- Policy structure and layout
- Policy covers, extensions, standard conditions and exclusions
- Risk factors and underwriting considerations
- Handling high net worth claims.

Learning outcomes

- Define standard and non-standard covers available
- Understand key conditions and exclusions
- Underwriting considerations
- Understand the importance of how claims are handled.

Who should attend?

It is aimed at those who are starting their journey in household insurance.

One day course

Date
13 Feb
Venue
London
Cost
£135 members £160 non-members

Introduction to insurance

CPD 6
CII Scheme | Hours

Overview

This course gives an overview of the insurance market and how it works.

Programme

- The basic principles of insurance
- Insurance terminology
- The key forms of insurance
- The structure of a policy document
- Why reinsure?

Learning outcomes

- Gain an understanding of insurance principles and practice.

Who should attend?

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

One day course

Date
17 Feb
Venue
London
Cost
£135 members £160 non-members

Introduction to Lloyd's

CPD 6
CII Scheme Hours

Overview

This course is designed to provide an understanding of the operation of Lloyd's within the global insurance market. The course includes a brief history of Lloyd's up to the present day and the important role it plays.

Programme

- Operation of Lloyd's
- Syndicates — what are they?
- Broking in Lloyd's
- Behind the scenes
- The role of Xchanging
- Terminology.

Learning outcomes

- Demonstrate a greater understanding of the Lloyd's & London market in general
- Understand how business is transacted.

Who should attend?

Those who are new to the industry, or those who would like to refresh their knowledge. It would also be suitable for support staff who would like to extend their knowledge in this area.

One day course

Date
08 Jan
Venue
London
Cost
£135 members £160 non-members

Liability insurance

CPD 6
CII Scheme Hours

Overview

This course is designed to put liability insurance into context and to introduce the delegates to the operation and principles of liability insurance.

Programme

- 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
- Industrial diseases
- Risk management and health and safety legislation
- Claims handling, the litigation process and current practices.

Learning outcomes

- Gain an overview of liability insurance
- Gain an understanding of the different types of liability insurance available
- Gain an overview of risk assessment and pricing, risk management and claims handling.

Who should attend?

This course has been designed for delegates with no previous involvement in liability insurance.

One day course

Dates
22 Jan/11 Mar
Venue
London
Cost
£135 members £160 non-members

Marine cargo and goods in transit

CPD 6
CII Scheme | Hours

Overview

This course is made up of three sections:

Risk assessment – the overall purpose of this session is to enable brokers to make full use of the quotation guide in order to secure the best possible terms and price.

ICCA – an in-depth analysis of the Institute Cargo Clauses (A) and reference will be made to the Marine Insurance Act 1906 that underpins the clause. It will also consider the impact of the London Market and broker wordings to show how the Institute Clause is amended.

Selling – the core subject for this session is overcoming client objections. It will also act as a refresher for previous sessions and provide a practical demonstration for knowledge gained.

Programme

- Risk assessment
- Institute Cargo Clauses
- Selling.

Learning outcomes

- Identify the marine cargo and goods in transit risks
- Consider underwriting features of marine cargo and goods in transit risks
- Review the main policy cover, terms, conditions and exceptions of goods in transit insurance
- To know the information required to obtain a quotation.

Who should attend?

Anyone who is new to cargo insurance. No experience necessary although some general knowledge of marine insurance would be helpful.

One day course

Date

02 Feb

Venue

London

Cost

£135 members
£160 non-members

Professional indemnity insurance

CPD 6
CII Scheme | Hours

Overview

The course is aimed at delegates who already have an understanding of professional indemnity insurance. It will be highly interactive and delegates will be given a series of exercises and case studies to reinforce their learning.

Programme

- Professional indemnity case law recent developments
- Practising requirements
- Accountants, solicitors, surveyors, architects, design and build, media, information technology and miscellaneous
- Policy coverage
- Underwriting considerations
- Risk management
- Claims management.

Learning outcomes

- Describe how recent case law and legislation has impacted the liability of professionals
- Identify the hazards associated with various major professionals including, but not limited to, accountants, solicitors, construction professionals, information technology and media
- Describe the coverage provided by professional indemnity policies including specific professional indemnity policy extensions
- Explain the major differences between the professional indemnity coverage offered to different professionals
- Explain the principal underwriting considerations which impact various professionals
- Describe how professionals can effectively manage their risk
- Identify the correct strategy for the handling of professional indemnity claims.

Who should attend?

Those who wish to extend their knowledge of insurance or to specialise in this class of business.

One day course

Date

25 Mar

Venue

London

Cost

£135 members
£160 non-members

Advanced professional indemnity insurance

CPD 6
CII Scheme | Hours

Overview

This course is for those familiar with professional indemnity insurance but who want a deeper understanding of issues affecting the placing and rating of PI risks for different sectors of the market.

Programme

- Potential PI markets
- Law and limitation issues
- Issues surrounding coverage, conditions and endorsements
- Specific PI wordings.

Learning outcomes

- Demonstrate an in-depth understanding of PI wordings and their significance
- Explain complex cover issues
- Understand topical issues within the PI market
- Demonstrate choices of covers for potential different PI markets
- Appreciate the legal issues affecting PI cover.

Who should attend?

This course is designed for those experienced in professional indemnity insurance and builds on the intermediate level course.

One day course

Date

14 Jan

Venue

London

Cost

£175 members
£195 non-members

Reinsurance

CPD 6
CII Scheme | Hours

Overview

This course provides an overview of the development of the reinsurance market and the necessary historical perspective to understand current practice. It will provide an insight into the key issues facing the market today and into the future. The programme is presented in an informal style with delegate participation encouraged via group discussion.

Programme

- The development and general principles of reinsurance
- Facultative reinsurance
- Treaty reinsurance
- Proportional reinsurance
- Non-proportional reinsurance.

Learning outcomes

- Obtain knowledge on the different types of reinsurance and when to use them
- Understand how the current market practice has developed.

Who should attend?

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

One day course

Date

16 Mar

Venue

London

Cost

£135 members
£160 non-members

Stats for insurers

CPD 6
CII Scheme Hours

Overview

This course is intended to explain the concepts behind the figures with practical examples taken from the insurance industry.

Programme

- Basic mathematics
- Statistical formulae
- Practical exercises from the insurance workplace
- Risk data and presentation of risk data
- Probability distribution.

Learning outcomes

- Understand how to apply basic mathematics in statistical formulae
- Obtain a basic grounding in mathematical principles
- Learn how to avoid common mistakes
- Clarify areas of concern in using formulae
- Understand the importance and application of statistics within insurance.

Who should attend?

New entrants or insurance professionals who require a basic understanding of mathematics and would like practice in using formulae. It will also be useful for any student sitting a CII exam that involves calculations.

One day course

Date
05 Mar
Venue
London
Cost
£135 members £160 non-members

Underwriting and risk assessment

CPD 6
CII Scheme Hours

Overview

This course will provide a more in-depth look at how risk is assessed and managed by insurers. It will help delegates to see how risks can be improved with consequent improvements in insurance terms. It will also provide knowledge of underwriting methods and how surveying affects the overall rating.

Programme

- Risk management and risk transfer
- How insurers assess risk and the tools they use
- How risk assessment affects decisions on underwriting
- Typical methods employed by underwriters
- Presenting risks to insurers
- Pricing and its relationship to underwriting
- Risk surveying and reporting
- Risk improvements required or desirable.

Learning outcomes

- Understand more about risk and the way risk is transferred and managed
- Gain insights into how underwriters assess risk and rate it
- Become more aware of surveying methods and how they affect rating
- Know more about working with insurers to obtain the best outcomes for the client.

Who should attend?

This course is for those who wish to know more about underwriting and the assessment of risk.

One day course

Date
05 Feb
Venue
London
Cost
£135 members £160 non-members

Yacht insurance



Overview

This course is designed to introduce delegates who are new to the basics of yacht insurance.

Programme

- The types of craft that can be insured
- The main differences between hull risks and yacht risks
- What are the key points that underwriters will be considering in relation to each type of risk?
- Where are the main yacht insurers?
- Review of the main London market yacht clauses and comparison with the main international clauses (German, Norwegian, American)
- Link between hull and liability coverage (Protection and Indemnity insurance)
- Overview of the legal regimes that impact on the shipping business
- Builders' risks insurance
- Types of claim that commonly arise
- Loss prevention.

Learning outcomes

- Gain an understanding of yacht risks
- Gain maximum benefit from experienced market speakers
- Obtain extensive introductory knowledge of yacht insurance and the related terminology.

Who should attend?

Anyone who is new to yacht insurance. No experience is necessary although some general knowledge of marine insurance would be helpful.

One day course

Date

30 Jan

Venue

London

Cost

£135 members

£160 non-members

Coaching and developing staff

CPD 6
CII Scheme Hours

Overview

This course aims to equip managers at all levels to promote high levels of staff competence and performance by developing their workplace coaching skills.

Programme

- The aims and benefits of coaching and the role of the coach
- How coaching compares to our day-to-day roles as managers
- The challenges associated with coaching – the barriers to effective coaching in the workplace and how to overcome them
- How to set meaningful goals and objectives for coaching sessions
- Identifying the coachee's real needs and issues
- Getting the coachee to talk – questioning and listening skills
- Encouraging the coachee to take ownership
- Creating meaningful personal development plans
- Balancing short term development with longer term career aims
- Building rapport and a supportive coaching environment
- Balancing the need for 'support' and 'challenge' to create a high performance culture
- When to be directive and when to consult
- Developing personal flexibility – increasing our range of coaching and influencing styles
- Understanding individuals' career drivers and the implications for workplace coaching.

Learning outcomes

- Describe the role of the coach and the benefits of effective workplace coaching
- Prepare for, and conduct, effective coaching sessions for others that address their current and longer term development needs
- Describe their personal coaching styles and the actions they can take to enhance their own effectiveness as coaches.

Who should attend?

Everyone who has a direct responsibility for the development of others.

One day course

Dates

24 Feb/26 Feb

Venue

London

Cost

£135 members
£160 non-members

Developing a training and competency scheme within your firm

CPD 6
CII Scheme Hours

Overview

This course will allow delegates to understand the basic requirements for training and competence within the current regulatory framework. It will provide practical help to establish the methods and the culture for effective training and competence.

Delegates will also learn how complying with regulations can also be used to enhance the performance of the business itself.

Programme

- The compliance responsibilities of management for T&C
- Setting up a T&C regime and culture
- Ensuring ongoing competence relative to the knowledge and skills required
- Measuring competence and keeping appropriate records
- What the regulations say
- Managing and supervising competence
- Practical methods for making it all happen.

Learning outcomes

- Understand the regulatory requirements for T&C
- Establish how effective T&C can help the business and compliance
- Plan and implement a system of T&C which will be effective
- Begin to implement a culture of T&C throughout the business
- Measure the effectiveness of T&C within the business.

Who should attend?

This course is suitable for those responsible for training and competence within their firms.

One day course

Date

29 Jan

Venue

London

Cost

£135 members
£160 non-members

Effective call handling

CPD 6
CII Scheme Hours

Overview

This interactive course is designed to help telephone staff to effectively manage calls confidently, assertively and in an efficient way and represent their organisation professionally. It is intended to provide a platform for effective and proactive call management and efficient handling and a benchmark for skills, behaviours and standards within your organisation.

Programme

- Understanding the call cycle
- Professional opening and closing of the call – the importance of first and last impressions to establish a relationship over the phone
- Greeting callers with confidence and concluding the call with clarity
- Corporate greeting and your organisational call handling standards
- Active listening – the difference between hearing and listening
- The importance of understanding your brand, values and services to give full value from the call
- Use of proactive questioning and response techniques
- Being assertive and using your voice, pitch and personality effectively to build rapport with the caller
- Taking ownership and being decisive to respond to the caller's needs
- Managing the callers expectations
- Managing the pace, direction and duration of calls whilst remaining professional.

Learning outcomes

- Demonstrate improved telephone and conversation management skills
- Improve listening, questioning and communication skills
- Validate and record relevant information while managing the content and duration of the call
- Manage the callers expectations and anticipated outcomes
- Handle calls whilst under pressure and deal with challenging calls professionally, calmly and in a structured way.

Who should attend?

This workshop is for all those who wish to become more confident and effective when taking inbound telephone calls.

One day course

Date

04 Mar

Venue

London

Cost

£135 members
£160 non-members

Effective presentations

CPD 6
CII Scheme Hours

Overview

This course is designed for staff who are required to make presentations with impact to groups, clients or staff. Delegates are required to have a potential (or actual) presentation requirement around which practical solutions will be created during the course.

Programme

- Setting objectives for a presentation and planning what is to be achieved from the presentation
- Delivering presentations to external or internal clients i.e. who is your audience?
- Planning and preparing for a presentation – including issues such as method and style of delivery, techniques, tools, room layout and kit
- How to structure and design a presentation
- Opening the presentation and breaking the ice
- First impressions – the effect of the visual and the vocal
- Understanding the key skills in delivering a presentation and handling audience reaction – communication skills, listening techniques when handling questions and other areas such as body language, building rapport etc.
- Meeting the needs of the audience
- Speaking with confidence
- Managing time and keeping on track
- The importance of evaluation of the presentation and the objectives
- Closing the presentation and next actions
- Practice (time permitting).

Learning outcomes

- List the ways in which people learn from presentations and identify different presentation styles and techniques
- Plan and prepare for greater presentation impact
- Give presentations with greater confidence and effectiveness
- Channel nervous energy to positive ends
- Handle questions, maintain interest and keep the audience hooked.

Who should attend?

Anyone who wants to feel more confident and effective about giving formal or informal presentations to customers or clients.

One day course

Date

20 Feb

Venue

London

Cost

£135 members
£160 non-members

Excel intermediate

CPD 6
CII Scheme Hours

Overview

This course is aimed at those who have a basic understanding of an Excel spreadsheet but who want to be more creative with formulas and show complex data more effectively.

Programme

- Worksheets, a further look
- Further formatting techniques
- Further functions
- Customising charts.

Learning outcomes

- Learn how to use advanced formatting and borders
- Learn how to use conditional statements and formatting
- Learn how to create and customise charts.

Who should attend?

Users with a basic understanding of Excel who want to consolidate and expand on their knowledge of the basic features in a short space of time.

One day course

Date
11 Feb
Venue
London
Cost
£135 members £160 non-members

Getting customer referrals

CPD 6
CII Scheme Hours

Overview

This workshop is for anyone who wants to learn how to connect with more people to better effect. It will identify and develop your confidence in the key skills needed to develop more business from your existing customers.

Programme

- What is networking?
 - What is it and why is it important?
 - Why does it work when other marketing fails?
 - Why doesn't everyone do it?
- Personal attributes of networkers
 - Are you a natural networker?
 - What attributes are needed and how do you gain the attributes?
 - How do you create the opportunity to network?
- Building relationships which allow you to ask for referrals
 - Developing the personal touch
 - Understanding and using 'give and take'
 - How to make customers feel good about getting you business
- Ensuring you know where your business is coming from
 - Tracking new business from referrals
 - Keeping the network growing
 - Saying thank you.

Learning outcomes

- Understand what networking is and how it works
- Consider the attributes needed to network and consider how to develop them
- Build customer relationships and then having the courage to ask
- Keep track of where the business came from.

Who should attend?

It is for anyone who wants to develop business relationships.

One day course

Date
04 Feb
Venue
London
Cost
£135 members £160 non-members

Leading effective teams

CPD 6
CII Scheme Hours

Overview

This interactive course is designed to provide new ideas and insights for team leaders, including a range of practical strategies which delegates can take away and use immediately.

Programme

- Making the transition from team member to team leader
- Balancing your responsibilities for your team with your own workload and responsibilities from your personal expertise
- Management and leadership styles
- How can teams be successful and why they can fail?
- What do individuals have to offer teams?
- The basics of Belbin's team roles
- The issues encountered in the team life cycle
- The essentials of coaching and feedback
- The benefits of coaching and feedback – individual, team and organisation
- Awareness and perception – Johari Window
- Giving feedback effectively and confidently
- Handling performance and conduct problems constructively
- How to use a structured model for coaching people
- The balance between managing the task, team and individuals.

Learning outcomes

- Identify their individual and team's skills and attributes
- Identify ways that they will support individuals to develop their team skills further
- Know which team roles are necessary to make a team work well
- Identify their management style
- Coach and develop their team members
- Balance their personal responsibilities with those of being a leader.

Who should attend?

The learning should be useful both for those new to leadership and also those with some experience. It should help build confidence to deal with issues as they arise and to inspire their teams.

One day course

Date
10 Mar
Venue
London
Cost
£135 members £160 non-members

Managing difficult customers

CPD 6
CII Scheme Hours

Overview

This course looks at how to deal with situations encountered when emotions have begun to take control of a business situation. It will help staff to deal with situations that can be stressful and disruptive.

Programme

- What is a complaint and why do people complain?
- Communication techniques to help reduce tension and stress
- Positive versus negative – how our attitude effects our response
- How to deal with people who like to be awkward
- Handling objections and taking ownership
- Keeping control and keeping to the facts
- Not taking things personally
- Action plan to ensure maximum benefit from the training.

Learning outcomes

- Learn how to take control of difficult situations
- See how diffusion techniques can take the heat out of the situation
- Cope better with stressful situations
- Maintain the best working relationship possible with those who can be difficult.

Who should attend?

This interactive course is suitable for delegates who deal with people either over the telephone or face-to-face in everyday situations.

One day course

Date
19 Mar
Venue
London
Cost
£135 members £160 non-members

Networking skills for brokers

CPD 6
CII Scheme | Hours

Overview

This course is designed for brokers who need to conduct negotiations with insurers, clients and others in the course of business. The techniques will be useful in a variety of situations but with the common theme that the parties will negotiate again in the future.

Programme

- What negotiation is and isn't
- Negotiating when both sides have advantages and weaknesses and both sides have critical needs
- Preparing for negotiation including setting objectives, gathering information and deciding which objectives are critical, important or 'nice to have'
- Communication skills, including how we communicate, creating the right impression and obtaining information
- Influencing skills using consultation, inspiration and persuasion
- Carrying out the negotiation, including
 - assertive, aggressive and passive behaviour
 - using the broker/insurer relationship
- Gaining recognition for all aspects of the offer, whether charged for or not
- Developing a strong and ongoing relationship by building trust and understanding which will help with future negotiations.

Learning outcomes

- Understand what negotiating is all about and prepare effectively
- Use communication skills to aid the negotiating process
- Influence others and develop stronger relationships
- Carry out negotiations with greater confidence.

Who should attend?

Anyone who has to handle customer buying/renewal discussions with clients and who want to feel more confident doing so.

One day course

Date

13 Jan

Venue

London

Cost

£135 members
£160 non-members

Personal assertiveness and effectiveness

CPD 6
CII Scheme | Hours

Overview

This course aims to equip delegates with the skills and confidence to employ an assertive style of interaction and communication in their working practices, and to enable these skills to be used to influence outcomes across all areas.

Programme

- Manipulating, influencing and persuasion – how do they differ?
- Strategies for building influence, persuasion and impact
- Typical approaches for influencing others: consultation, inspiration and persuasion
- Influencing styles (aggressive, assertive and passive) and the use of those styles in various situations
- The power of self-awareness and knowing how we are perceived
- Communication techniques.

Learning outcomes

- Identify the key elements of effective influence and persuasion
- Develop greater personal impact in the workplace
- Learn how they are perceived by others through greater self-awareness
- Utilise different influencing styles.

Who should attend?

Those who would like to improve their personal impact and effectiveness through the use of a range of persuasion and influencing skills. This is for people at all levels who wish to increase their impact and learn more about how they are perceived.

One day course

Date

16 Jan

Venue

London

Cost

£135 members
£160 non-members

London

Business and soft skills

Time management



Overview

This course will help delegates manage their own time and the time of others. It will show leaders how effective delegation cannot only be efficient but also motivational.

Programme

- Take control of your time
- Identifying what is important and what is urgent
- Using a step by step process to manage your time
- Overcoming obstacles where time is wasted
- What is delegation and what are its benefits?
- Which tasks can you delegate and which can you not?
- Who can you delegate to and who should you avoid delegating to?
- How to delegate effectively.

Learning outcomes

- Manage their own time and the time of others
- Prioritise own workload and understand the workload of others
- Overcome obstacles where time is wasted
- Delegate effectively and to the right people
- Utilise new skills for effective planning, prioritisation and the management of personal workload
- Manage workload in an organised and structured way.

Who should attend?

Managers, supervisors and team leaders.

One day course

Date
23 Jan
Venue
London
Cost
£135 members £160 non-members

Regional courses

-
- 24 Business interruption insurance
 - 24 Claims handling
 - 25 Intermediate construction insurance
 - 25 Contract works insurance
 - 26 Contractors liability insurance
 - 26 Cyber risks insurance
 - 27 Directors' and officers' liability insurance
 - 27 High net worth
 - 28 How to handle personal injury claims
 - 28 Introduction to insurance
 - 29 Kidnap, ransom and personal security
 - 29 Liability insurance
 - 30 Professional indemnity insurance
 - 30 Advanced professional indemnity insurance
 - 31 Reinsurance
 - 31 Risk management (theory and practice)
 - 32 Stats for insurers
 - 33 Developing a training and competency scheme within your firm
 - 33 Effective call handling
 - 34 Getting customer referrals
 - 34 Leading effective teams
 - 35 Managing difficult customers
 - 35 Personal assertiveness and effectiveness
 - 36 Time management

Business interruption insurance

CPD 6
CII Scheme | Hours

Overview

This course provides an introduction to the principles and practices of business interruption insurance. It explores the aspects which need to be understood by those involved in providing basic technical or administrative services.

Programme

- A review of covers available including gross profit, increased cost of working and book debts
- A study of policy cover including extent of cover, conditions and exclusions applying and extensions available
- An outline of declaration linked covers and a review of indemnity periods
- A useful introduction to risk assessment and rating commonly used
- An invaluable overview of risk management and contingency planning
- The principles of claims handling and the role of the loss adjuster in business interruption claims.

Learning outcomes

- Recognise some of the problems in handling this class of business
- Understand the basic factors that will affect the setting of a correctly forecasted estimate or sum insured for gross profit, revenue and fees cover
- Identify the main features of a risk that will influence an underwriter in their assessment of acceptance of cover
- Demonstrate how a simple claim is handled.

Who should attend?

This course will be suitable for those already working in the field of commercial property but who wish to extend their work/knowledge into business interruption.

One day course

Venue/date

Leeds: 21 Jan

Southampton: 24 Mar

Cost

£120 members
£140 non-members

Claims handling

CPD 6
CII Scheme | Hours

Overview

This course will provide valuable background knowledge into claims handling.

Programme

- 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.

Learning outcomes

- Learn the basic principles of claims handling.

Who should attend?

This course 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.

One day course

Date

31 Mar

Venue

Newcastle

Cost

£120 members
£140 non-members

Intermediate construction insurance

CPD 6
CII Scheme | Hours

Overview

This course 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 course is on contractors' all risks, and property insurance. This is an interactive workshop with a mixture of tuition and case studies.

Programme

- Risks specific to contractors
- An introduction to contract conditions
- Policy cover – an analysis of.

Learning outcomes

- Understand why the cover is needed and how it is provided
- Have an understanding of 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.

Who should attend?

This course is suitable for delegates that have attended the introductory courses for contract works or contractors liability insurances or for those currently looking to develop their knowledge of construction insurance.

One day course

Venue/date

Norwich: 29 Jan

Manchester: 26 Mar

Cost

£120 members

£140 non-members

Contract works insurance

CPD 6
CII Scheme | Hours

Overview

This course gives an overview of what contract works insurance is all about. Aimed as an introduction to the topic it looks at the key issues affecting policy cover and how to place and rate risks.

Programme

- What is it and how is it usually arranged?
- Risks and property covered
- Common conditions
- Usual policy terms
- Underwriting considerations.

Learning outcomes

- Understand the various options for contract works insurance cover
- Show an understanding of key conditions and clauses affecting cover
- Develop an awareness of the key issues for underwriting cover
- Know the main optional extras that can apply.

Who should attend?

It is aimed at those new to contract works insurance but who have a basic knowledge of commercial property and liability insurance.

One day course

Date

22 Jan

Venue

Birmingham

Cost

£120 members

£140 non-members

Contractors liability insurance

CPD 6
CII Scheme Hours

Overview

This workshop gives an overview of what a contractors liability insurance policy is all about. Aimed as an introduction to the topic it looks at the key issues affecting policy cover and how to place and rate risks.

Programme

- The need for cover
- Legal principles
- Health and safety regulations
- Wordings, exclusions and extensions
- Placing and rating risks
- Claims procedures.

Learning outcomes

- Understand the various options for contractors liability insurance cover
- Show an understanding of the difference between contractual obligations and insurance requirements
- Show an awareness of the standard structure of a policy and the optional extras available
- Develop an awareness of the key issues for underwriting cover.

Who should attend?

It is aimed at those new to contractors liability insurance but who have a basic knowledge of commercial property and liability insurance.

One day course

Venue/date

Belfast: 20 Mar

Bristol: 25 Mar

Birmingham: 27 Mar

Cost

£120 members

£140 non-members

Cyber risks insurance

CPD 6
CII Scheme Hours

Overview

Information technology continues to develop and this course looks at what cover is available to protect against the risks that can arise. No previous knowledge of the topic is required although an understanding of basic liability insurance would be useful.

Programme

- What are cyber risks?
- Who is exposed to them?
- Standard covers, conditions and exclusions
- Underwriting considerations for this type of business
- Claims issues relating to cyber cover.

Learning outcomes

- Identify typical customers and their needs for cyber risks insurance
- Describe typical policy covers and what is available
- State the information required for underwriters to make a pricing decision
- Understand key issues affecting claims resolution.

Who should attend?

It is aimed at those who want an improved knowledge of the fast growing cyber insurance market.

One day course

Venue/dates

Leicester: 14 Jan/19 Mar

Manchester: 20 Mar

Cost

£120 members

£140 non-members

Directors' and officers' liability insurance

CPD 6
CII Scheme | Hours

Overview

The course is aimed at delegates who already have an understanding of directors' & officers' liability insurance. It will be highly interactive as delegates will be given a series of exercises and case studies to reinforce their learning.

Programme

- 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

- Describe the duties of directors' and officers'
- Compare and contrast the potential personal liability of directors' and officers' in both the UK and USA
- Describe how recent legal developments may impact future claims exposure
- Outline how directors' duties and liabilities may differ in other jurisdictions
- Describe the principal benefits of a directors' & officers' liability policy
- Explain the principal extensions and exclusions which are usually included in a directors' & officers' policy
- Outline how directors' & officers' coverage dovetails with other liability coverage
- Identify the principal underwriting considerations which apply
- Identify the key features of directors' & officers' liability claims handling.

Who should attend?

Those who wish to extend their knowledge of insurance or to specialise in this class of business.

One day course

Date

20 Feb

Venue

Manchester

Cost

£120 members
£140 non-members

High net worth

CPD 6
CII Scheme | Hours

Overview

This course looks at the extra benefits that build on to a normal household insurance policy to provide high net worth cover and how these affect acceptance and cost for the customer.

Programme

- Risk factors and underwriting considerations
- Policy covers, standard conditions and exclusions
- Risk management applicable to high net worth cover
- Handling high net worth claims.

Learning outcomes

- Define additional covers available under high net worth policies
- Understand key conditions and exclusions
- Underwriting considerations for high net worth cover
- Understand the importance of how high net worth claims are handled.

Who should attend?

It is aimed at those who have an understanding of household insurance and want to move up to handling high net worth clients.

One day course

Date

26 Mar

Venue

Leicester

Cost

£120 members
£140 non-members

How to handle personal injury claims

CPD 6
CII Scheme | Hours

Overview

This course looks at how injury claims are dealt with and why this matters to brokers. It will demonstrate how delegates can be more effective in looking after their clients who find themselves held responsible for injuring others.

Programme

- How different types of liability result in claims against your client
- Trends in injury claims including common frauds
- Developments in the legal system you need to know about
- How injury claims are investigated by insurers
- The role of the broker throughout the process
- How injury settlements are calculated
- The impact of these settlements on your client's policies.

Learning outcomes

- Gain a greater awareness of the impact of injury claims in the market
- Understand what the current trends are and how they affect your clients
- Be an effective broker as part of the claims handling process
- Explain to your clients how third party injury claims affect them.

Who should attend?

Brokers who are acting on behalf of their clients with regard to personal injury claims made against them.

One day course

Date

30 Mar

Venue

Leeds

Cost

£120 members
£140 non-members

Introduction to insurance

CPD 6
CII Scheme | Hours

Overview

This course gives an overview of the insurance market and how it works.

Programme

- The basic principles of insurance
- Insurance terminology
- The key forms of insurance
- The structure of a policy document
- Why reinsure?

Learning outcomes

- Gain an understanding of insurance principles and practice.

Who should attend?

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

One day course

Venue/date

Leicester: 26 Feb

Bristol: 17 Mar

Cost

£120 members
£140 non-members

Kidnap, ransom and personal security

CPD 6
CII Scheme Hours

Overview

This workshop introduces the subject of kidnap, ransom and personal security. It provides an overview which will allow delegates to become more confident in terms of understanding the risks and the cover available together with risk management which can be employed.

Programme

- Typical cover available in the market
- Usual policy construction and wordings
- Exceptions and restrictions of cover
- Awareness of personal safety issues
- Personal security arrangements often used
- Area of the world known to present risks
- Data ransom for businesses
- Case studies to bring the subject to life.

Learning outcomes

- Consider the risks of kidnap and ransom and those likely to be targeted
- Understand the cover and protection available from insurance
- Consider the steps which can be taken to mitigate against risk
- Be aware of the places where this type of crime is most likely to occur
- Gain some insight into data ransom
- Discuss specific wordings brought to the workshop.

Who should attend?

This workshop is suitable for those who are new to kidnap & ransom insurance.

One day course

Date

30 Jan

Venue

Leeds

Cost

£120 members
£140 non-members

Liability insurance

CPD 6
CII Scheme Hours

Overview

This course is designed to put liability insurance into context and to introduce delegates to the operation and principles of liability insurance.

Programme

- 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
- Industrial diseases
- Risk management and health and safety legislation
- Claims handling, the litigation process and current practices.

Learning outcomes

- Gain an overview of liability insurance
- Gain an understanding of the different types of liability insurance available
- Gain an overview of risk assessment and pricing, risk management and claims handling.

Who should attend?

This course has been designed for delegates with no previous involvement in liability insurance.

One day course

Date

12 Feb

Venue

Leeds

Cost

£120 members
£140 non-members

Professional indemnity insurance

CPD 6
CII Scheme | Hours

Overview

The course is aimed at delegates who already have an understanding of professional indemnity insurance. It will be highly interactive and delegates will be given a series of exercises and case studies to reinforce their learning.

Programme

- Professional indemnity case law recent developments
- Practising requirements
- Accountants, solicitors, surveyors, architects, design and build, media, information technology and miscellaneous
- Policy coverage
- Underwriting considerations
- Risk management
- Claims management.

Learning outcomes

- Describe how recent case law and legislation has impacted the liability of professionals
- Identify the hazards associated with various major professionals including, but not limited to, accountants, solicitors, construction professionals, information technology and media
- Describe the coverage provided by professional indemnity policies including specific professional indemnity policy extensions
- Explain the major differences between the professional indemnity coverage offered to different professionals
- Explain the principal underwriting considerations which impact various professionals
- Describe how professionals can effectively manage their risk
- Identify the correct strategy for the handling of professional indemnity claims.

Who should attend?

Those who wish to extend their knowledge of insurance or to specialise in this class of business.

One day course

Venue/date

Bristol: 27 Feb

Leeds: 18 Mar

Manchester: 15 Jan

Cost

£120 members
£140 non-members

Advanced professional indemnity insurance

CPD 6
CII Scheme | Hours

Overview

This course is for those familiar with professional indemnity insurance but who want a deeper understanding of issues affecting the placing and rating of PI risks for different sectors of the market.

Programme

- Potential PI markets
- Law and limitation issues
- Issues surrounding coverage, conditions and endorsements
- Specific PI wordings.

Learning outcomes

- Demonstrate an in-depth understanding of PI wordings and their significance
- Explain complex cover issues
- Understand topical issues within the PI market
- Demonstrate choices of covers for potential different PI markets
- Appreciate the legal issues affecting PI cover.

Who should attend?

This course is designed for those experienced in professional indemnity insurance and builds on the intermediate level course.

One day course

Date

13 Feb

Venue

Leeds

Cost

£155 members
£175 non-members

Reinsurance

CPD 6
CII Scheme | Hours

Overview

This course provides an overview of the development of the reinsurance market and the necessary historical perspective to understand current practice. It will provide an insight into the key issues facing the market today and into the future. The programme is presented in an informal style with delegate participation encouraged via group discussion.

Programme

- The development and general principles of reinsurance
- Facultative reinsurance
- Treaty reinsurance
- Proportional reinsurance
- Non-proportional reinsurance.

Learning outcomes

- Obtain knowledge on the different types of reinsurance and when to use them
- Understand how the current market practice has developed.

Who should attend?

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

One day course

Date
04 Mar
Venue
Norwich
Cost
£120 members £140 non-members

Risk management (theory and practice)

CPD 6
CII Scheme | Hours

Overview

This course gives delegates a comprehensive introduction to the world of risk management. The course outlines the important issues surrounding risk management and seeks to improve knowledge and understanding of the many factors that might increase an organisation's exposure to risk.

Programme

- What is risk management?
- What is the need for a risk manager in the present day business environment?
- What is the role of a risk manager?
 - Health and safety issues
 - Detecting risk
 - Risk analysis techniques
 - Obtaining data
 - Statistical analysis
 - Risk mapping
 - Maximum or probable loss analysis
 - Hazard and operability studies
- Risk retention – incentives for this strategy
- Risk financing – threats and opportunities
- Business continuity strategies
- The future of the discipline of risk management
- Growing challenges facing the risk manager.

Learning outcomes

- Gain an insight into risk management
- Obtain knowledge from an experienced risk manager
- Gain an understanding of the growing challenges facing the risk manager.

Who should attend?

Anyone working within, or who has a wish to gain specialist knowledge of risk management.

One day course

Date
28 Jan
Venue
Reading
Cost
£120 members £140 non-members

Stats for insurers



Overview

This course is intended to explain the concepts behind the figures with practical examples taken from the insurance industry.

Programme

- Basic mathematics
- Statistical formulae
- Practical exercises from the insurance workplace
- Risk data and presentation of risk data
- Probability distribution.

Learning outcomes

- Understand how to apply basic mathematics in statistical formulae
- Obtain a basic grounding in mathematical principles
- Learn how to avoid common mistakes
- Clarify areas of concern in using formulae
- Understand the importance and application of statistics within insurance.

Who should attend?

New entrants or insurance professionals who require a basic understanding of mathematics and would like practice in using formulae. It will also be useful for any student sitting a CII exam that involves calculations.

One day course

Date

27 Jan

Venue

Bristol

Cost

£120 members

£140 non-members

Developing a training and competency scheme within your firm

CPD 6
CII Scheme Hours

Overview

This course will allow delegates to understand the basic requirements for training and competence within the current regulatory framework. It will provide practical help to establish the methods and the culture for effective training and competence.

Delegates will also learn how complying with regulations can also be used to enhance the performance of the business itself.

Programme

- The compliance responsibilities of management for T&C
- Setting up a T&C regime and culture
- Ensuring ongoing competence relative to the knowledge and skills required
- Measuring competence and keeping appropriate records
- What the regulations say
- Managing and supervising competence
- Practical methods for making it all happen.

Learning outcomes

- Understand the regulatory requirements for T&C
- Establish how effective T&C can help the business and compliance
- Plan and implement a system of T&C which will be effective
- Begin to implement a culture of T&C throughout the business
- Measure the effectiveness of T&C within the business.

Who should attend?

This course is suitable for those responsible for training and competence within their firms.

One day course

Date
19 Feb
Venue
Leeds
Cost
£120 members £140 non-members

Effective call handling

CPD 6
CII Scheme Hours

Overview

This interactive course is designed to help telephone staff to effectively manage calls confidently, assertively and in an efficient way and represent their organisation professionally. It is intended to provide a platform for effective and proactive call management and efficient handling and a benchmark for skills, behaviours and standards within your organisation.

Programme

- Understanding the call cycle
- Professional opening and closing of the call – the importance of first and last impressions to establish a relationship over the phone
- Greeting callers with confidence and concluding the call with clarity
- Corporate greeting and your organisational call handling standards
- Active listening - the difference between hearing and listening.
- The importance of understanding your brand, values and services to give full value from the call
- Use of proactive questioning and response techniques
- Being assertive and using your voice, pitch and personality effectively to build rapport with the caller
- Taking ownership and being decisive to respond to the caller's needs
- Managing the callers expectations
- Managing the pace, direction and duration of calls whilst remaining professional.

Learning outcomes

- Demonstrate improved telephone and conversation management skills
- Improve listening, questioning and communication skills
- Validate and record relevant information while managing the content and duration of the call
- Manage the callers expectations and anticipated outcomes
- Handle calls whilst under pressure and deal with challenging calls professionally, calmly and in a structured way.

Who should attend?

This workshop is for all those who wish to become more confident and effective when taking inbound telephone calls.

One day course

Date
05 Feb
Venue
Leicester
Cost
£120 members £140 non-members

Getting customer referrals

CPD 6
CII Scheme Hours

Overview

This workshop is for anyone who wants to learn how to connect with more people to better effect. It will identify and develop your confidence in the key skills needed to develop more business from your existing clients.

Programme

- What is networking?
 - What is it and why is it important?
 - Why does it work when other marketing fails?
 - Why doesn't everyone do it?
- Personal attributes of networkers
 - Are you a natural networker?
 - What attributes are needed and how do you gain the attributes?
 - How do you create the opportunity to network?
- Building relationships which allow you to ask for referrals
 - Developing the personal touch
 - Understanding and using 'give and take'
 - How to make clients feel good about getting you business
- Ensuring you know where your business is coming from
 - Tracking new business from referrals
 - Keeping the network growing
 - Saying thank you.

Learning outcomes

- Understand what networking is and how it works
- Consider the attributes needed to network and consider how to develop them
- Build client relationships and then having the courage to ask
- Keep track of where the business came from.

Who should attend?

It is for anyone who wants to develop business relationships.

One day course

Date

03 Feb

Venue

Manchester

Cost

£120 members
£140 non-members

Leading effective teams

CPD 6
CII Scheme Hours

Overview

This interactive course is designed to provide new ideas and insights for team leaders, including a range of practical strategies which delegates can take away and use immediately.

Programme

- Making the transition from team member to team leader
- Balancing your responsibilities for your team with your own workload and responsibilities from your personal expertise
- Management and leadership styles
- How can teams be successful and why can they fail?
- What do individuals have to offer teams?
- The basics of Belbin's team roles
- The issues encountered in the team life cycle
- The essentials of coaching and feedback
- The benefits of coaching and feedback – individual, team and organisation
- Awareness and perception – Johari Window
- Giving feedback effectively and confidently
- Handling performance and conduct problems constructively
- How to use a structured model for coaching people
- The balance between managing the task, team and individuals.

Learning outcomes

- Identify their individual and team's skills and attributes
- Identify ways that they will support individuals to develop their team skills further
- Know which team roles are necessary to make a team work well
- Identify their management style
- Coach and develop their team members
- Balance their personal responsibilities with those of being a leader.

Who should attend?

The learning should be useful both for those new to leadership and also those with some experience. It should help build confidence to deal with issues as they arise and to inspire their teams.

One day course

Date

10 Feb

Venue

Birmingham

Cost

£120 members
£140 non-members

Managing difficult customers

CPD 6
CII Scheme | Hours

Overview

This course looks at how to deal with situations encountered when emotions have begun to take control of a business situation. It will help staff to deal with situations that can be stressful and disruptive.

Programme

- What is a complaint and why do people complain?
- Communication techniques to help reduce tension and stress
- Positive versus negative — how our attitude effects our response
- How to deal with people who like to be awkward
- Handling objections and taking ownership
- Keeping control and keeping to the facts
- Not taking things personally
- Action plan to ensure maximum benefit from the training.

Learning outcomes

- Learn how to take control of difficult situations
- See how diffusion techniques can take the heat out of the situation
- Cope better with stressful situations
- Maintain the best working relationship possible with those who can be difficult.

Who should attend?

The interactive course is suitable for delegates who deal with people either over the telephone or face-to-face in everyday situations.

One day course

Date

10 Mar

Venue

Leeds

Cost

£120 members
£140 non-members

Personal assertiveness and effectiveness

CPD 6
CII Scheme | Hours

Overview

This course aims to equip delegates with the skills and confidence to employ an assertive style of interaction and communication in their working practices, and to enable these skills to be used to influence outcomes across all areas.

Programme

- Manipulating, influencing and persuasion – how do they differ?
- Strategies for building influence, persuasion and impact
- Typical approaches for influencing others: consultation, inspiration and persuasion
- Influencing styles (aggressive, assertive and passive) and the use of those styles in various situations
- The power of self-awareness and knowing how we are perceived
- Communication techniques.

Learning outcomes

- Identify the key elements of effective influence and persuasion
- Develop greater personal impact in the workplace
- Learn how they are perceived by others through greater self-awareness
- Utilise different influencing styles.

Who should attend?

Those who would like to improve their personal impact and effectiveness through the use of a range of persuasion and influencing skills. This is for people at all levels who wish to increase their impact and learn more about how they are perceived.

One day course

Date

25 Feb

Venue

Norwich

Cost

£120 members
£140 non-members

Time management



Overview

This course will help delegates manage their own time and the time of others. It will show leaders how effective delegation cannot only be efficient but also motivational.

Programme

- Take control of your time
- Identifying what is important and what is urgent
- Using a step by step process to manage your time
- Overcoming obstacles where time is wasted
- What is delegation and what are its benefits?
- Which tasks can you delegate and which can you not?
- Who can you delegate to and who should you avoid delegating to?
- How to delegate effectively.

Learning outcomes

- Manage their own time and the time of others
- Prioritise own workload and understand the workload of others
- Overcome obstacles where time is wasted
- Delegate effectively and to the right people
- Utilise new skills for effective planning, prioritisation and the management of personal workload
- Manage workload in an organised and structured way.

Who should attend?

Managers, supervisors and team leaders.

One day course

Date

04 Feb

Venue

Southampton

Cost

£120 members

£140 non-members

Contacting Broker Academy Training

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