

CII Broker Academy Training

2016 course programme



in partnership with



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Insurance Broking Faculty |  CII

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The Chartered Insurance Institute (CII) Professionalism in practice

As the premier professional body for the financial services profession, the CII promotes higher standards of integrity, technical competence and business capability.

With over 115,000 members in more than 150 countries, the CII is the world's largest professional body dedicated to this sector.

Success in CII qualifications is universally recognised as evidence of knowledge and understanding. Membership of the CII signals a desire to develop broad professional capability and subscribe to the standards associated with professional status.

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

Individually, CII's members are able to drive their personal development and maintain their professional standing through an unrivalled range of learning services and by adhering to the CII's Code of Ethics.



INVESTORS
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Contacting the CII

If you have any queries regarding the information in this brochure please contact Customer Service.

The CII is committed to delivering a first-class service and, to this end, we welcome feedback on any aspect of your relationship with our organisation.

Please forward any views you may have on the service you receive, whether they are positive or otherwise.

We take all such comments seriously, answer them individually, and use them to help ensure that we continually improve the service we provide.

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website: www.cii.co.uk/brokeracademytraining

Face-to-face broker training

The Broker Academy's 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 insurance brokers, these are suitable for both brokers and the wider insurance community. Courses deliver a stimulating and rewarding learning environment to sharpen skills and enhance career potential.

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

The UK-wide training programme delivers high-quality training at affordable prices, with a full-day's training from only £125 for CII members and £145 for non-members. Course titles, type, date and pricing are listed by location over the following pages with full details available online.

Additional employer 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. These can be delivered 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 and feedback.

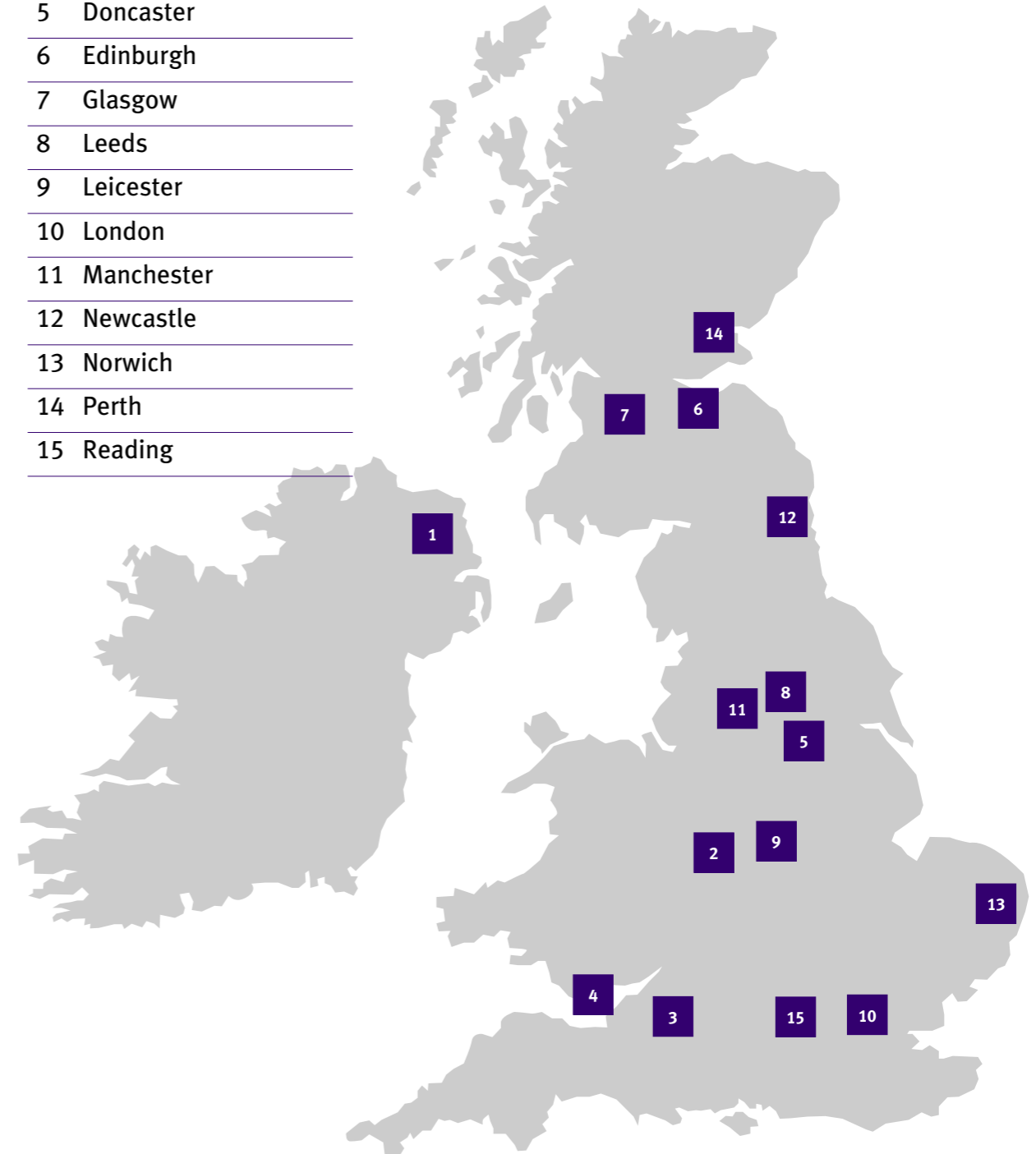
To book or find out more

Web: www.cii.co.uk/brokeracademytraining

Call: +44 (0)20 8989 8464

Email: brokeracademytraining@cii.co.uk

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| 15 | Reading |



Your corporate training partner

The diversity of our course programme and breadth of corporate services makes us a one-stop-shop training provider. We work in partnership with employers to develop relevant and cost-effective training solutions that are driven by business needs and deliver lasting results.

What our customers think

“Excellent course, excellent trainer. Very beneficial to my everyday work.”

Commercial property insurance delegate
March 2015

“The course was very informative and I thought the trainer was superb in every area.”

Cyber risks insurance delegate
March 2015

“Really enjoyed the course. Trainer was very knowledgeable and easy to talk to.”

Liability insurance delegate
March 2015

“RFIB places a strong focus on training and development, to ensure our people have the technical skills and knowledge to deliver the best experience for our clients. The CII Broker Academy courses are an important part of our training and development programme as they offer broking-specific learning across a wide range of topics relevant to the sector. We use them both as part of our employee induction programme and to meet identified development needs for our staff.”

Wesley Clarke MCIPD
Senior HR Business Partner
RFIB



“As Chartered Insurance Brokers, we are committed to professionalism and the development of our people. The technical learning available through the CII Broker Academy is an important component of our training and development programme. The one day courses offer a wide range of insurance broking topics and we have found the content to be relevant and of high quality.”

Beverley Brown FCII MBA
Broking Director
ProAktive

ProAktive

Freeing you to do what you do best..

Technical insurance courses

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Technical insurance courses

Intermediate binding authority management



Overview

This course looks at the practical aspects of delegated claims and underwriting authorities from a binding authority management perspective. It will assess the benefits and potential issues of using binding authorities, in addition to its application across different classes of business.

Programme

- Types of binding authorities
- The benefits of using them
- Potential underwriting and claims issues
- Binding authority audits.

Learning outcomes

At the end of the course you will be able to:

- Understand the reasons for using binding authorities
- Know the legal principles behind binding authorities
- Understand the different objectives and roles of the parties involved
- Appreciate how binding authorities are regulated
- Identify best practice
- Understand the use of authority limits.

Who should attend?

This course is for those working with binding authorities, whether from an underwriting, claims or broking background.

One day course

Venues/dates	Cost
London: 23 Mar/21 Nov	£160 members £180 non-members
Birmingham: 08 Mar	£140 members
Edinburgh: 22 Apr	£155 non-members

Intermediate bloodstock insurance



Overview

This course explores insurance cover available for different animals and looks at the common and not so common risks that need to be protected.

Programme

- How bloodstock insurance developed
- Understand the risks
- Understand the cover available
- Explore practical scenarios for use
- Understand different needs for different animals.

Learning outcomes

At the end of the course you will be able to:

- Describe the risks, covers, restrictions and exclusions available
- Understand the pricing considerations for bloodstock insurance
- Understand claims implications and issues.

Who should attend?

This course is designed for those with a basic understanding of bloodstock insurance who would like to gain a greater understanding of the risks and covers available across the market.

One day course

Venues/dates	Cost
London: 14 Apr/07 Dec	£160 members £180 non-members
Birmingham: 19 May	£140 members
Glasgow: 18 Jan	£155 non-members

Technical insurance courses

Introduction to business interruption insurance



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

- Covers available including gross profit, increased cost of working and book debts
- Policy cover including extent of cover, conditions and exclusions applying and extensions available
- Declaration linked covers and indemnity periods
- Risk assessment and rating commonly used
- Risk management and contingency planning
- Principles of claims handling and the role of the loss adjuster in business interruption claims.

Learning outcomes

At the end of the course you will be able to:

- 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
- Explain the difference between property damage and business interruption insurance
- Describe the coverage provided under a business interruption policy
- Describe examples of business interruption claims
- Outline the different bases of coverage available under a business interruption policy
- Describe how the maximum indemnity period operates.

One day course

Venues/dates	Cost
London: 12 Jan	£140 members £165 non-members
Belfast: 30 Sep	£125 members
Manchester: 04 Nov	£145 non-members
Reading: 25 Oct	

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.

Follow-on course

Intermediate business interruption insurance, **see opposite**.

Intermediate business interruption insurance



Overview

This interactive course provides participants with an opportunity to explore business interruption insurance in more detail than the introductory course.

Programme

- 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

At the end of the course you 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

One day course

Venues/dates	Cost
London: 29 Jan	£160 members £180 non-members
Birmingham: 13 Jun	£140 members
Leeds: 03 Nov	£155 non-members
Newcastle: 28 Oct	

- 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.

Who should attend?

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

Follow-on course

Advanced business interruption insurance – issues and updates, **see page 8**.

Technical insurance courses

Advanced business interruption insurance – issues and updates



Overview

The aim of the course is to develop and update delegates' knowledge of business interruption insurance. Using a mixture of practical exercises and case studies, delegates develop solutions to some of the more complex issues and policy disputes 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.

Note: The nature of the course means the content is likely to vary.

One day course

Venues/dates	Cost
London: 27 Jan/13 Oct	£180 members £200 non-members
Birmingham: 03 May/ 21 Jul	£160 members £180 non-members
Norwich: 16 Jun/13 Dec	

Learning outcomes

At the end of the course you will be able to:

- Review and update client's current business interruption coverage in light of recent policy developments and policy disputes
- Advise clients appropriately on the selection of correct basis of coverage, maximum indemnity period and sum insured or loss limit
- Review business interruption 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 business interruption claim.

Who should attend?

This course has been designed for delegates with previous involvement in business interruption insurance but who wish to refresh their knowledge and ensure they are up to date.

Introduction to claims handling for brokers



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

At the end of the course you will have knowledge of 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

Venues/dates	Cost
London: 05 Jul	£140 members £165 non-members
Birmingham: 21 Jan	£125 members
Leeds: 09 Feb	£145 non-members
Reading: 12 Feb	

Follow-on course

Intermediate claims handling for brokers, see page 9.

Technical insurance courses

Intermediate claims handling for brokers



Overview

This thought-provoking course examines the ways claims are handled and explores some of the more involved aspects of claims handling.

Programme

- Claims management from first reporting
- Use of outside consultants and experts and their timely appointment
- Claims investigations
- Fraud and the use of specialist investigators
- The principles of insurance as they apply to claims handling
- Establishing policy liability
- Establishing liability for losses or damage incurred
- Negotiating loss settlements
- Damages for injury and the requirements of evidence
- Preparing for legal action to defend against or pursue third parties
- Handling 'long tail' claims and those which will take time to settle.

Learning outcomes

At the end of the course you will be able to:

- Better manage claims from first reporting
- Understand the need for experts and how they are used
- See how liability is established and also whether the claim is actually covered by the policy
- Understand how more complex claims are negotiated and settled
- Understand how the legal system works in relation to claims.

One day course

Venues/dates	Cost
London: 27 Jun	£160 members £180 non-members
Birmingham: 29 Mar	£140 members
Leeds: 17 May	£155 non-members

Who should attend?

This course is for those who are already handling claims, either as a broker or an insurer. It provides a more in-depth coverage than an introductory level course and will be useful for those taking charge of more serious claims.

Introduction to commercial insurance



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.

One day course

Venues/dates	Cost
London: 04 Mar/12 Jul	£140 members £165 non-members
Birmingham: 26 Sep	£125 members
Bristol: 26 Jan	£145 non-members
Perth: 28 Jun	
Reading: 08 Aug	

Learning outcomes

At the end of the course you will have:

- Obtained a broad knowledge of commercial insurance
- Understood commercial insurance products and covers available
- Gained 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.

Follow-on course

Introduction to commercial insurance packages, see **page 10**.

Technical insurance courses

Introduction to commercial insurance packages



Overview

This course 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

At the end of the course you will be able to:

- 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 course is ideal for those with less than 12 months' experience of commercial insurance.

One day course

Venues/dates	Cost
London: 12 Apr	£140 members £165 non-members
Norwich: 13 Oct	£125 members £145 non-members

Follow-on course

Introduction to commercial property insurance, see [opposite](#).

Introduction to commercial property insurance



Overview

This course is designed to put commercial property insurance into 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

At the end of the course you will have:

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

One day course

Venues/dates	Cost
London: 28 Apr	£140 members £165 non-members
Bristol: 12 Sep	£125 members
Leeds: 17 Feb	£145 non-members

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.

Follow-on course

Intermediate commercial property insurance, see [page 11](#).

Technical insurance courses

Intermediate commercial property insurance



Overview

Following on from the introductory course, the intermediate course takes an in-depth look at commercial property insurance, policy cover and associated claims and underwriting considerations.

Programme

- 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

At the end of the course you 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.

One day course

Venues/dates	Cost
London: 17 May	£160 members £180 non-members
Cardiff: 15 Mar	£140 members
Doncaster: 06 Jan/ 11 Aug	£155 non-members
Leicester: 22 Apr	

Who should attend?

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

Introduction to construction insurance



Overview

This course provides an engaging introduction to the subjects of contract works, contractors all risks and contractors liability insurance.

Programme

- The subject of the cover
 - Risks and property insured
 - The terms used
 - The various ways cover can be arranged
- Contract conditions
 - JCT standard form of contract
 - Contractual obligation
 - Insurance needed
 - Contract works, liability, plant
- Contract works cover
 - Typical cover
 - Usual exclusions and extensions
 - Common alternatives
- Liability cover
 - Usual cover
 - Exclusions and extensions
- Rating risks
- Claims handling.

Learning outcomes

At the end of the course you will:

- Be aware of contract works insurance and the various ways cover is provided
- Be aware of the usual content of contract works and contractors liability insurance policies and the usual optional extras

One day course

Venues/dates	Cost
London: 07 Jun/13 Oct	£140 members £165 non-members
Doncaster: 22 Jan	£125 members
Glasgow: 22 Sep	£145 non-members

- Be aware of the insurance clauses within the JCT contract and the difference between contractual and insurance requirements
- Be aware of the underwriting and claims processes.

Who should attend?

It is suitable for those with a good background in commercial insurance but who are still new to construction insurance.

Follow-on course

Intermediate construction insurance, see **page 12**.

Technical insurance courses

Intermediate construction insurance



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
 - Contract works
 - Plant – own and hired-in
 - Existing property
 - Liability risks
 - Design and build risks
 - Delay in completion
- 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.

One day course

Venues/dates	Cost
London: 25 Aug	£160 members £180 non-members
Bristol: 19 May	£140 members
Doncaster: 30 Mar/ 11 Oct	£155 non-members
Leeds: 27 Jun	

Learning outcomes

At the end of the course you will be able to:

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

Intermediate contingency insurance



Overview

This informative course is designed to improve and enhance delegates' understanding of contingency insurance.

Programme

- The types of contingency insurance available and their target markets including:
 - Non-appearance
 - Cancellation
 - Weather
 - Prize/promotion indemnity
 - Over redemption
 - Sports; incl. player bonuses
 - Film
- Producers' indemnity
- Completion guarantee
- Recent claims
- Ensuring the insured has the appropriate coverage
 - Choosing the correct limit of indemnity; splitting the limit of indemnity
 - Excluding or including profit
 - Ensuring period of insurance is adequate/flexible
 - Broadening the definition of perils
 - Disease vs. illness
 - Expenses vs. gross revenue coverage
 - Coverage enhancements
 - Ancillary coverages
 - Typical policy warranties – what to watch for
 - Exclusions
 - Comparing and contrasting policy wordings
- Underwriting considerations
 - Proposal forms
 - Medical questionnaires

One day course

Venues/dates	Cost
London: 27 Sep/05 Dec	£160 members £180 non-members
Doncaster: 27 May	£140 members £155 non-members

- Claims handling
- Current market developments
- Selling contingency insurance.

Learning outcomes

At the end of the course you will be able to:

- Describe and target the different types of contingency insurance and which clients are most in need
- Explain the key components of contingency insurance wordings
- Design and place contingency insurance coverage to meet the needs of the client
- Compare and contrast different contingency insurance policy wordings
- Assist clients and present underwriting information in order to get the best deal
- Handle contingency insurance claims
- Devise a sales strategy for selling contingency insurance.

Who should attend?

This course is suitable for account handlers and brokers dealing with clients who might have the need for contingency insurance and anyone who wants a broad understanding of what the contingency insurance market offers.

Technical insurance courses

Intermediate contract vetting



Overview

Brokers are often asked to comment on the insurance implications of commercial contracts by customers. This can be difficult as they are insurance advisors not legal advisors but it is still useful to have a good understanding of the risk and insurance implications of commercial contracts. In this one day course (through a series of case studies) we examine various commercial contracts and discuss and analyse their risk and insurance implications.

Programme

- Different types of contract
 - Employment contracts
 - Leases for land and buildings
 - Contracts for supply of goods or services
 - Contracts for construction, installation and erection
 - Collateral warranties
- Contract law (overview)
- Key contract clauses to review
 - Insurance clauses
 - Additional insured v co-insured v joint insured requirements
 - Indemnities
 - Hold harmless
 - Waivers of subrogation
- Relevant insurance clauses
- Responding to contractual queries
 - Standard “To whom it may concerns”
 - Completing contractors’ questionnaires.

One day course

Venues/dates	Cost
London: 04 Jan/ 05 Aug/31 Oct/14 Dec	£160 members £180 non-members
Birmingham: 11 Apr	£140 members
Manchester: 14 Jan	£155 non-members

Learning outcomes

At the end of the course you will be able to:

- Understand different types of commercial contract
- Identify the relevant portions of a commercial contract that impact the client’s exposures and insurance requirements
- Outline the impact of indemnity, hold harmless and waiver of subrogation clauses
- Advise insured whether they currently purchase the insurances required by the contract
- Advise insurers appropriately of the contractual arrangements
- Draft and complete “To whom it may concern” letters and contractors’ questionnaires appropriately
- Explain to customers why all contractual liabilities are not covered by insurance.

Who should attend?

Brokers who are asked to complete contractors’ questionnaires or review clients’ contracts.

Introduction to crime and fidelity guarantee insurance



Overview

This interactive course provides an introduction to the principles of crime and fidelity guarantee insurance.

Programme

- Reasons why customers buy crime and fidelity guarantee insurance
- The different cover levels available
- Outline of policy cover and the main exclusions and restrictions
- The factors involved in the assessment of crime and fidelity guarantee insurance risks
- The principles of claims handling for crime and fidelity guarantee insurance
- Typical methods of investigation used in crime and fidelity guarantee insurance claims handling.

Learning outcomes

At the end of the course you will be able to:

- Describe the subject matter of crime and fidelity guarantee insurance and the needs of customers who buy it
- Outline the policy structure and describe the protection provided
- Identify the main features of a risk that would influence an underwriter in their assessment
- Outline the principles and handling procedures relating to crime and fidelity guarantee claims.

Who should attend?

This course explores the aspects which need to be understood by those involved in providing basic technical or administrative services.

One day course

Venue/dates	Cost
London: 07 Jan/18 Oct	£140 members £165 non-members

Technical insurance courses

Introduction to cyber risks insurance



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.

One day course

Venues/dates	Cost
London: 29 Apr	£140 members £165 non-members
Birmingham: 29 Jul	£125 members
Glasgow: 29 Nov	£145 non-members
Leeds: 16 Sep	

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

At the end of the course you will be able to:

- 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.

Follow-on course

Intermediate cyber risks insurance, see **opposite**.

Intermediate cyber risks insurance



Overview

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 course follows on from the introductory course 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 course also looks at the different cover options available, how they apply to different clients, the key risk management issues and claims matters.

Programme

- What are cyber risks?
- The impact of cloud computing on cyber risks
- The 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
- The major risk management issues of cyber risks
- Examples of cyber risks insurance claims and the issues of dealing with such claims.

Learning outcomes

At the end of the course you will be able to:

- Understand the main cyber risks and which types of customer could benefit from insurance against cyber risks

One day course

Venues/dates	Cost
London: 24 May	£160 members £180 non-members
Birmingham: 10 Oct	£140 members
Leeds: 13 Apr	£155 non-members
Manchester: 24 Jun	

- Understand the impact of cloud computing on cyber risks
- Understand the extent of cover provided by conventional insurance policies against cyber risks
- Understand the policy cover, conditions and exclusions of specialist cyber risks insurance policies in the UK and when separate policies are appropriate
- Be aware of the different cover options available in the cyber policy market and how they apply to different clients
- Know of the key risk management issues
- Understand how cyber risk insurance claims arise and the issues of dealing with these claims.

Who should attend?

Delegates who have attended our Introduction to cyber risks insurance course, 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.

Technical insurance courses

Introduction to directors' and officers' liability insurance



Overview

This course is aimed at delegates who already have an understanding of directors' and 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

At the end of this course you will be able to:

- 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' and officers' liability policy
- Explain the principal extensions and exclusions which are usually included in a directors' and officers' policy
- Outline how directors' and officers' coverage dovetails with other liability coverage
- Identify the principal underwriting considerations which apply
- Identify the key features of directors' and officers' liability claims handling.

One day course

Venues/dates	Cost
London: 01 Jun	£140 members £165 non-members
Leeds: 16 Nov	£125 members
Leicester: 21 Mar	£145 non-members
Perth: 29 Jan	

Who should attend?

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

Follow-on course

Intermediate directors' and officers' liability insurance, see **opposite**.

Intermediate directors' and officers' liability insurance



Overview

This interactive course provides participants with an opportunity to explore directors' and officers' liability insurance in more depth than the introductory course.

Programme

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

Learning outcomes

At the end of the course you 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' claim
- Explain current developments in the directors' and officers' insurance market.

One day course

Venues/dates	Cost
London: 01 Dec	£160 members £180 non-members
Belfast: 03 Jun	£140 members
Birmingham: 26 Jan	£155 non-members
Leicester: 16 Sep	

Who should attend?

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

Technical insurance courses

Introduction to engineering insurance and inspection



Overview

This interactive course provides an overview of engineering insurance and introduces delegates to the ways in which this product is provided and administered.

Programme

- Why must pressure plant, lifting and handling and other equipment be inspected?
- How inspection of such equipment forms an essential part of engineering insurance
- Types of plant and equipment included in the requirements
- Issues typically found which require action
- The cover provided by engineering insurance policies
- How engineering insurance dovetails with other insurance
- Case studies to show how engineering insurance typically works.

Learning outcomes

At the end of the course you will be able to:

- Understand the way inspection forms an essential part of engineering insurance
- Understand the types of plant and equipment covered
- Know the kind of things which can go wrong
- Have a working knowledge of engineering cover
- Speak with more confidence to clients about engineering insurance.

One day course

Venues/dates	Cost
London: 10 Jun/17 Nov	£140 members £165 non-members
Bristol: 02 Jun	£125 members
Leeds: 11 Aug	£145 non-members
Newcastle: 11 Feb	

Who should attend?

This course is for those who are new to engineering insurance or who have limited experience of it. It will be useful for brokers who wish to discuss this cover with clients but need the basic knowledge and confidence to do so.

Intermediate environmental liability insurance



Overview

This course will provide delegates with a fundamental understanding of the risks associated with pollution and environmental damage and the ways in which firms can become responsible for damage suffered by third parties and for remediation (clean up) costs. The course reviews the forms of insurance cover that are available, including the limited cover that is available under traditional property and liability policies and the wider cover provided by environmental liability insurance (EIL). Underwriting problems, claims issues and key insurance market developments are also considered.

Programme

- Evolution of environmental liability regimes
- Common sources of pollution and contamination
- Common law liability for pollution and environmental damage
- Statutory liabilities for pollution and environmental damage, including the EU Environmental Liability Directive
- Regulatory action and regulatory powers in relation to pollution and environmental damage
- Types of remediation
- Problems in insuring environmental liability
- Insurance cover for pollution and environmental damage
- Claims issues and problems
- Market trends
- Exercises and case studies.

One day course

Venues/dates	Cost
London: 15 Feb	£160 members £180 non-members
Birmingham: 14 Nov	£140 members
Newcastle: 10 Aug	£155 non-members

Learning outcomes

At the end of the course you will be able to:

- Identify the main sources of pollution and contamination and the underlying law on pollution and environmental liability
- Outline the main forms of insurance cover that are available
- Analyse, evaluate and compare insurance policy wordings relating to pollution and environmental liability
- Describe the key underwriting and claims issues affecting environmental liability
- Understand the EIL market and its current trends.

Who should attend?

This course will benefit delegates who already have a general understanding of liability risk and liability insurance business. It will be of benefit to employees of insurance broking firms who need to advise their clients on environmental liability and evaluate the insurance products that cover it; in addition to underwriters, risk managers and insurance buyers who need to evaluate risks shaping their firms.

Technical insurance courses

Introduction to farming insurance



Overview

This course is designed to provide delegates with an introduction to farm insurance cover and associated considerations.

Programme

- The different types of farming in the UK
 - Arable
 - Horticulture
 - Dairy
 - Cattle, pigs and sheep
 - Poultry
 - Organic
- Farm insurance cover
 - Property damage
 - Business interruption
 - Liability
 - Livestock
 - Crop damage, e.g. hail
 - Agricultural motor insurance
- Farm insurance policy conditions and exclusions
- The special condition of average applicable to farmers
- Underwriting considerations for farm insurance.

Learning outcomes

At the end of the course you will be able to:

- Have a thorough understanding of the nature of insurances required by farmers in order to comply with statutory requirements
- Detail the main insurable property damage and business interruption perils
- Understand and explain the main policy cover, conditions and exclusions of a farm insurance policy

One day course

Venues/dates	Cost
London: 06 Sep	£140 members £165 non-members
Birmingham: 24 Aug	£125 members
Leicester: 24 Feb	£145 non-members

- List the main forms of liability insurance and describe how they can protect farmers
- Detail the nature and scope of information insurers will require when quoting for farm insurance
- Explain the primary motor insurance cover options available.

Who should attend?

Those who are new to farming insurance.

Intermediate financial institutions insurance



Overview

This course explores the risks that financial institutions face in today's increasingly technological world. It looks at the options open to them to reduce their risk exposure.

Programme

- Understand key business activities
- Understand different types of financial institutions and their particular and shared risks
- Understand the different covers and restrictions available
- Explore policy wordings.

Learning outcomes

At the end of the course you will be able to:

- Understand the main insurable risks faced by financial institutions
- Describe ways of reducing their risks
- Describe the different types of policies available
- Appreciate underwriting and claims issues.

Who should attend?

This course is for those with a basic understanding of commercial insurance who want to gain a greater understanding of the risks faced by and covers available to financial institutions.

One day course

Venues/dates	Cost
London: 19 Jul	£160 members £180 non-members
Bristol: 13 Oct	£140 members
Leicester: 20 Jun	£155 non-members

Technical insurance courses

Introduction to household and high net worth insurance



Overview

This course introduces delegates to the operation and principles of household and high net worth insurance.

Programme

- Household policy cover, conditions and exceptions – buildings/contents
- Extensions in policy cover that are readily available e.g. personal possessions, legal expenses, pets, etc
- The difference between household mid net worth and high net worth insurances
- High net worth insurance – policy covers, conditions and exceptions
- High net worth policy extensions and additional services
- Household and high net worth underwriting considerations and how they apply to new and existing customers
- The implication of losses on policy cover, conditions and exclusions
- The concept of “risk management” and its application to household insurance
- The importance of exceptional claims service and the methods by which this may be achieved
- Practical claims issues.

Learning outcomes

At the end of the course you will be able to:

- Outline the coverage provided under a household insurance policy
- Determine what policy extensions are appropriate to which types of insured
- Outline the additional coverage and services provided to customers on high net worth insurance business

One day course

Venues/dates	Cost
London: 30 Sep	£140 members £165 non-members
Belfast: 28 Jan	£125 members
Edinburgh: 12 Dec	£145 non-members

- Describe the key underwriting considerations for household and high net worth insurance
- Handle household and high net worth insurance claims quickly and effectively.

Who should attend?

This course has been designed for delegates with no previous involvement in household or high net worth insurance.

Intermediate household and high net worth insurance



Overview

This interactive course takes a more in-depth look at household insurance although focuses particularly on high net worth insurance and the way this business is handled and provided in the market.

Programme

- Who are high net worth policies designed for?
- The essential elements of high net worth versus mid net worth versus household
- The way insurers assess high net worth clients and the services typically provided
- How the cover under high net worth policies differs from typical household cover
- Essential issues such as security and protection associated with high value property
- Why non-standard is standard for high net worth clients
- Why the client is the biggest factor rather than the property
- Expectations of high net worth clients
- The specialist nature of high net worth claims.

Learning outcomes

At the end of the course you will be able to:

- Describe the nature of the high net worth client
- Explain the type of service that high net worth clients will typically expect
- Evaluate the wider value of the high net worth client and their likely importance for other associated business
- Describe the additional cover provided by high net worth policies compared to mid net worth and household policies

One day course

Venues/dates	Cost
London: 20 Oct	£160 members £180 non-members
Leicester: 06 May/ 21 Nov	£140 members £155 non-members
Manchester: 16 May	

- Compare the typical additional services provided to high net worth clients by different insurers
- Assist the handling of any claims under a high net worth policy
- Liaise more effectively with the personal managers and executive assistants of high net worth clients.

Who should attend?

This course is for those who need to liaise with high net worth clients and ensure the service they receive reaches their expectations. It is intended for those who already understand household insurance and wish to explore the facilities and opportunities provided by high net worth insurance as well as household insurance in more detail.

Technical insurance courses

Introduction to insurance



Overview

This course provides an essential introduction to the principles and workings of insurance and the market in which it operates.

Programme

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

Learning outcomes

At the end of this course you will have gained a fundamental 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.

Follow-on course

Introduction to Lloyd's and London Market, see [page 22](#).

One day course

Venues/dates	Cost
London: 15 Jun/11 Oct	£140 members £165 non-members
Belfast: 01 Apr	£125 members
Bristol: 14 Mar	£145 non-members
Glasgow: 10 May	
Leicester: 04 Jul	

Introduction to jewellers, fine arts and species insurance



Overview

This course is designed to introduce you to the basics of jewellers block, fine arts and species classes of business.

Programme

- Introduction to and history of these classes of business
- Understand what types of risks apply to each class of business
- Understand the main underwriting considerations and clauses used in the London Market
- Loss prevention and mitigation.

Learning outcomes

At the end of the course you will:

- Possess foundation knowledge on covers available
- Be able to describe ways of reducing the risks
- Be able to outline underwriting and claims issues for each of these three classes of business.

Who should attend?

This course is suitable for those who have a basic understanding of personal insurances and are looking to develop their knowledge in this class of business.

One day course

Venue/dates	Cost
London: 25 May/ 08 Aug/13 Dec	£140 members £165 non-members

Technical insurance courses

Intermediate kidnap, ransom and personal security



Overview

This course explores the subject of kidnap, ransom and personal security, providing an understanding of the risks and the cover available together with risk management options that can be employed.

Programme

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

Learning outcomes

At the end of the course you will be able to:

- 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.

Who should attend?

This course is suitable for those who have a basic understanding of personal insurances and are looking to develop their knowledge in this class of business.

One day course

Venue/dates	Cost
London: 15 Jan/ 27 May/30 Aug/07 Sep	£160 members £180 non-members

Introduction to liability insurance



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

At the end of the course you will have:

- Gained an overview of liability insurance
- Gained an understanding of the different types of liability insurance available
- Gained 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.

Follow-on course

Intermediate liability insurance, see **page 21**.

One day course

Venues/dates	Cost
London: 19 Jan/ 09 May/12 Oct	£140 members £165 non-members
Doncaster: 14 Jun	£125 members
Glasgow: 21 Jul	£145 non-members
Leeds: 01 Mar	

Technical insurance courses

Intermediate liability insurance



Overview

This interactive course will provide participants with an opportunity to explore employers' liability, public and products liability insurance in more depth than the introductory course.

Programme

- Types of employers' liability, public and products liability policy available
- Ways in which liability arises, either through acts of parliament, common law or court precedent, reviewing court decisions
- Policy wordings and the typical extensions and restrictions
- Policy cover 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
- Disease claims
- Claims handling – court procedures and protocols.

Learning outcomes

At the end of the course you will be able to:

- Explain more detailed aspects of employers', public and products liability insurance
- Have an awareness of how legislation can impact on policy cover
- Describe the various types of protection available and discuss more specialist covers.

Who should attend?

Those who have hands-on experience of liability insurance.

One day course

Venues/dates	Cost
London: 16 Mar/ 27 Jun/16 Aug	£160 members £180 non-members
Birmingham: 06 Sep	£140 members
Bristol: 12 Apr	£155 non-members
Manchester: 10 Mar/ 08 Sep	

Follow-on course

Advanced liability insurance – update and emerging risk issues, see **opposite**.

Advanced liability insurance – update and emerging risk issues



Overview

In this course involving a series of short case studies, we update delegates on changes in case law, legislation, technology and medical research that may impact clients' future liability exposures. Covering recent liability policy developments and disputes, delegates will develop action plans to ensure clients are both aware of and appropriately protected against new and emerging exposures.

Programme

- Recent UK case law
- Health and safety update
- International issues that may impact UK based clients with international exposures
- Liability policy disputes
- How liability policies should dovetail
- Liability wordings recent developments
- Liability claims statistics
- Recent liability policy claims disputes.

Learning outcomes

At the end of the course you will be able to:

- Brief clients on legal and other developments which impact their liability exposure
- Devise strategies to improve the liability protection of existing clients in light of recent changes
- Design and place cost effective liability programmes
- Assess liability policy coverage to determine whether it is providing appropriate protection
- Analyse and critique the liability programmes and policy coverage of prospective clients
- Argue and negotiate effectively on behalf of the insured in the event of a liability claim dispute.

One day course

Venues/dates	Cost
London: 07 Apr/25 Aug	£180 members £200 non-members
Bristol: 06 Dec	£160 members
Cardiff: 18 Nov	£180 non-members
Perth: 11 Mar	
Reading: 19 Apr	

Who should attend?

Those with hands-on experience of liability insurance who wish to develop and update their understanding of recent changes in the law, litigation process, policy disputes and emerging risks.

Technical insurance courses

Introduction to Lloyd's and London Market



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

At the end of this course you will be able to:

- Demonstrate a greater understanding of the Lloyd's and 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.

Follow-on course

Introduction to insurance, see [page 19](#).

One day course

Venue/dates	Cost
London: 18 Mar/ 11 Apr/15 Sep	£140 members £165 non-members

Introduction to marine cargo and goods in transit insurance



Overview

This course will provide delegates with an insightful overview of marine cargo and goods in transit insurance, and will consider the main type of policy cover available.

Programme

- 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.

Learning outcomes

At the end of this course you will be able to:

- 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
- 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

Venues/dates	Cost
London: 21 Jan/ 23 Sep/26 Oct	£140 members £165 non-members
Birmingham: 04 Nov	£125 members
Bristol: 10 Jun	£145 non-members
Leeds: 04 May/17 Oct	

Follow-on course

Intermediate marine cargo and goods in transit insurance, see [page 23](#).

Technical insurance courses

Intermediate marine cargo and goods in transit insurance



Overview

This course explains the main methods of cargo shipment and the documents used in international trade. It also examines the main areas of loss prevention and key considerations of cargo underwriting. Delegates participate actively in the course with the opportunity for discussions with key marine market speakers.

Programme

- The law
- Cargo underwriting
- Clauses
- Cargo loss prevention – a cargo surveyor's view
- Containers – the problems associated with insuring containers
- Cargo claims
- Practical exercises.

Learning outcomes

At the end of the course you will:

- Have increased knowledge of cargo shipment
- Understand practical market considerations.

Who should attend?

Staff of brokers, insurance companies and Lloyd's syndicates.

One day course

Venues/dates	Cost
London: 23 May/09 Nov	£160 members £180 non-members
Bristol: 08 Nov	£140 members £155 non-members

Intermediate marine hull insurance



Overview

The major aspects of marine hull insurance are covered including shipowners' liabilities, exclusions and limitations. Candidates are given an in-depth insight into the clauses that apply to hull insurance, a practical consideration of underwriting broking problems and hull claims.

Programme

- Types of vessels and the relative risks they pose
- International maritime law as it applies to a ship owner
- How maritime law differs between different countries
- What insurance products are available to protect the insured's exposure
- Who has an input into the decision on whether to buy insurance
- Insurers – mutual and non-mutual and where they are located
- Marine Insurance Act 1906 and how it may apply other than in the UK
- Hull clauses including comparisons between different forms and how additional clauses can be added if required
- Claims handling and casualty management including piracy issues.

Learning outcomes

At the end of the course you will have:

- Gained an insight into the risks faced by marine vessels and the legal framework within which the insured operates
- An understanding of how maritime law can be used to assist the acceptance of insurers' analysis risk, and what risks are covered under the standard hull wordings used in London and overseas
- Undertaken a review of claims and casualty management.

One day course

Venue/dates	Cost
London: 14 Jun/ 01 Sep/24 Oct	£160 members £180 non-members

Who should attend?

Staff of brokers, companies and Lloyd's syndicates. You are expected to have a working knowledge of the basic fundamentals of marine insurance.

Technical insurance courses

Introduction to motor fleet insurance



Overview

This interactive course provides delegates with an introduction to motor fleet insurance cover and associated considerations.

Programme

- Primary risks associated with motor fleet 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 fleet insurances are rated and an examination of the relevant underwriting factors.

Learning outcomes

At the end of the course you will be able to:

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

One day course

Venues/dates	Cost
London: 11 Jul	£140 members £165 non-members
Birmingham: 15 Sep	£125 members
Doncaster: 15 Mar	£145 non-members
Newcastle 19 Oct	

Who should attend?

This course has been designed for those with no previous involvement in motor fleet insurance.

Introduction to motor insurance



Overview

This interactive course provides a useful introduction into the way motor insurance works and is handled in the market.

Programme

- The basics of motor insurance
- How motor insurance is influenced by and works to support legal requirements
- The rating of motor risks
- Typical policy documentation
- Underwriting motor business
- Risk management including theft prevention
- Managing younger drivers including telematics
- Introduction to motor claims.

Learning outcomes

At the end of the course you will be able to:

- Understand the way motor insurance works
- Know how motor business is rated and underwritten
- See how policy documents are written
- Know more about issues such as young drivers
- Help clients more effectively using new knowledge gained.

Who should attend?

This course is designed for those who are new to motor insurance. It provides the background knowledge needed for looking after clients wanting a personal service rather than just using a website.

One day course

Venues/dates	Cost
London: 02 Jun	£140 members £165 non-members
Birmingham: 08 Feb	£125 members
Leeds: 27 Oct	£145 non-members
Reading: 23 Jun	

Technical insurance courses

Introduction to motor insurance claims



Overview

This interactive course provides delegates with the knowledge and skills required to help manage motor claims. Given the frequency of motor claims, the insights gained from this workshop should be useful on a regular basis.

Programme

- Types of motor claim usually encountered
- Policy liability and ensuring cover was in place
- Types of motor claim including fire and theft
- Repairs to clients' vehicles and property
- Replacement vehicles and the handling of total losses
- Contributory negligence and its potential effect on the claim
- Investigations into liability for losses and damage
- Third party claims and how losses from such claims can be reduced
- Managing third party injury and property claims
- Recovering losses against third parties
- The role of the Financial Conduct Authority in claims handling
- The role of the Motor Insurer's Bureau
- Examples of major motor claims including court actions.

Learning outcomes

At the end of the course you will be able to:

- Understand the various types of motor claim encountered
- Know more about the way motor claims are handled by insurers
- Manage the claim more effectively from a broking point of view

One day course

Venues/dates	Cost
London: 07 Jun	£140 members £165 non-members
Birmingham: 27 Apr	£125 members
Cardiff: 11 Jan	£145 non-members
Manchester: 21 Oct	

- Support clients better through motor losses and claims
- Help clients and insurers deal with third party claims against them
- Assist clients in their own recovery of losses
- Understand more about the way the legal system handles motor claims.

Who should attend?

The course is designed for all those who have become involved in the management of motor claims. It will help those who are advising clients, liaising with insurers or ensuring the process runs as smoothly as possible.

Introduction to motor trade insurance



Overview

This interactive course provides delegates with an introduction to motor trade insurance cover and associated considerations.

Programme

- Primary risks associated with motor trade businesses
- The reasons why a motor trader needs a special type of motor insurance policy
- 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 factors.

Learning outcomes

At the end of the course you 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.

One day course

Venues/dates	Cost
London: 27 Jan/ 11 May/19 Aug/10 Nov	£140 members £165 non-members
Leeds: 15 Jun	£125 members £145 non-members

Who should attend?

This course has been designed for those with no previous involvement in motor trade insurance.

Technical insurance courses

Introduction to personal injury claims



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

At the end of the course you will:

- Have 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
- Gain the knowledge to 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

Venues/dates	Cost
London: 04 May	£140 members £165 non-members
Bristol: 26 Aug	£125 members
Doncaster: 03 Mar	£145 non-members

Introduction to professional indemnity insurance



Overview

This course is aimed at those 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

At the end of the course you will be able to:

- 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.

One day course

Venues/dates	Cost
London: 18 Nov	£140 members £165 non-members
Doncaster: 20 May	£125 members
Leeds: 31 May	£145 non-members
Manchester: 23 Feb	

Who should attend?

Although an introductory course, this course will be of benefit to delegates with some existing knowledge of professional indemnity insurance, particularly those who work in this area of business.

Follow-on course

Intermediate professional indemnity insurance, see [page 27](#).

Technical insurance courses

Intermediate professional indemnity insurance



Overview

This course is aimed at those 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

- The duty of care owed by professionals – legal liability and breach of contract
- Professional negligence claims
- Differing professional exposures, including:
 - Accountants
 - Lawyers
 - Surveyors
 - IT and telecommunications companies
- Professional indemnity and errors and omissions policy; key elements of cover:
 - Operative clause
 - ‘Claims made’ considerations
 - Principal exclusions
 - 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 professional indemnity protocols.

Learning outcomes

At the end of the course you 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

One day course

Venues/dates	Cost
London: 21 Jun	£160 members £180 non-members
Doncaster: 29 Jul	£140 members
Leeds: 23 Sep	£155 non-members

- 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.

Who should attend?

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

Follow-on course

Advanced professional indemnity insurance – update and emerging issues, see **opposite**.

Advanced professional indemnity insurance – update and emerging issues



Overview

In this one day workshop involving a series of case studies, we update delegates on changes in case law and legislation that may impact professionals’ liability exposures as well as comparing and contrasting the exposure of different types of professional. We also review recent professional indemnity policy coverage, market developments and policy disputes. Delegates will develop action plans to ensure professionals are appropriately protected.

Programme

- Recent UK case law and changes in statute that may impact professionals
- International issues that may impact UK based professionals with international exposures
- The different professionals
- How professional indemnity policies dovetail with other policies
- Professional indemnity programme design
- Professional indemnity wordings recent developments
- Professional indemnity recent policy disputes
- Dealing with international exposures
- Risk management
- Complex issues in professional indemnity claims.

Learning outcomes

At the end of the course you will be able to:

- Brief professional clients on legal and other developments which impact their liability exposure
- Design and place cost effective professional indemnity programmes for UK-only clients and those with international exposures

One day course

Venues/dates	Cost
London: 08 Jul/28 Oct	£180 members £200 non-members
Doncaster: 27 Sep/ 30 Nov	£160 members £180 non-members

- Assess professional indemnity policy coverage to determine whether it is providing appropriate protection and contains all available policy enhancements for that type of professional
- Analyse and critique the professional indemnity programmes and policy coverage of prospective clients
- Argue and negotiate effectively on behalf of the insured in the event of a professional indemnity claim dispute.

Who should attend?

Those with hands-on experience of professional indemnity insurance who wish to develop and update their understanding of recent changes in the law and policy coverage or learn about other professionals.

Technical insurance courses

Introduction to property owners' insurance



Overview

This course is designed for the brokers who deal with clients that have multiple property owners' portfolios. It will cover the traditional property topics but also look at additional covers for issues that can arise for landlords and property managers.

Programme

- Major challenges faced by property owners
- Underwriting risks
- Construction
- Heating
- Multi-tenure
- Unoccupied building
- Claims examples
- Policy wordings exclusions, conditions and clauses
- Policy covers, property, business interruption, liabilities.

Learning outcomes

At the end of the course you will be able to:

- Describe risk and underwriting features
- Explain policy wording, conditions and exclusions of property owner's policy both residential and commercial
- Outline major causes of fire in property owners
- Describe risk management features and how a risk can be improved.

Who should attend?

Underwriters, who handle and have some experience in the placing and renewal of residential and commercial property owning risks, will benefit from this course.

One day course

Venues/dates	Cost
London: 02 Nov	£140 members £165 non-members
Doncaster: 05 May	£125 members
Leeds: 16 Mar	£145 non-members
Norwich: 04 Jul	

Introduction to reinsurance



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

At the end of this course you will have:

- Obtained knowledge on the different types of reinsurance and when to use them
- Understood 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.

Follow-on course

Intermediate reinsurance and alternative risk transfer, see [page 29](#).

One day course

Venues/dates	Cost
London: 04 Feb/04 Oct	£140 members £165 non-members
Doncaster: 21 Jun	£125 members £145 non-members

Technical insurance courses

Intermediate reinsurance and alternative risk transfer



Overview

This course 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.

Programme

Detailed study of:

- Proportional reinsurance
- Non-proportional reinsurance
- Liability
- Practical workshops (property and liability).

Pulling it all together in an interactive session on designing a reinsurance programme.

Learning outcomes

At the end of the course you will:

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

Who should attend?

Anyone who wishes to widen their technical knowledge of reinsurance.

One day course

Venues/dates	Cost
London: 23 Feb/ 08 Mar/21 Oct/04 Nov	£160 members £180 non-members
Belfast: 01 Dec	£140 members
Doncaster: 23 Aug/ 27 Oct	£155 non-members

Intermediate risk management – theory and practice



Overview

This introductory 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?
- What do others expect of the 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

At the end of the course you will have:

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

One day course

Venues/dates	Cost
London: 12 Feb/29 Nov	£160 members £180 non-members
Birmingham: 16 Jun	£140 members
Cardiff: 07 Sep	£155 non-members

Who should attend?

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

Technical insurance courses

Introduction to the role of the broker



Overview

This interactive course provides an overview of the role of the insurance broker in today's market and the responsibilities which accompany broking responsibilities.

Programme

- The fundamental role played by insurance brokers
- The regulatory regime applying to broking
- The legal requirements of agents in general and brokers in particular
- What should customers expect from their broker?
- The relationship between broker, client and insurer
- Assessing client needs, establishing the facts and investigating solutions
- Recommendations for risk management and risk transfer
- Selecting insurers, schemes and other cover arrangements
- How errors and omissions can arise
- Avoiding errors and omissions
- The Financial Services Compensation scheme and the Financial Ombudsman Service
- Handling claims and the responsibility of the broker
- The future of broking in the UK.

Learning outcomes

At the end of the course you will be able to:

- Understand what broking is really about
- Know what constraints and requirements are placed on brokers
- Understand how the relationship between broker, client and insurer works

One day course

Venues/dates	Cost
London: 29 Feb/12 Dec	£140 members £165 non-members
Doncaster: 25 Feb	£125 members
Leeds: 12 Jul	£145 non-members

- Provide better advice for clients and more informed submissions to insurers
- Avoid some of the pitfalls which can lead to errors and omissions
- Help clients more at the time of a claim.

Who should attend?

The course is appropriate for all those involved in broking who need to really understand what it is all about. It provides the background knowledge to enable delegates to provide a more informed service to clients.

Introduction to travel insurance



Overview

This introductory course provides a good grounding in the subject of travel insurance.

Programme

- Cover for cancellation, curtailment and delay
- Baggage cover and conditions
- Money and document cover
- Medical fees and cover for hospitalisation
- Personal accident cover
- Personal liability whilst on holiday
- Legal expenses protection
- Typical extensions and restrictions of cover
- Underwriting and pricing of travel insurance
- How travel insurance is sold and administered
- Typical travel claims
- Travel insurance and the FCA.

Learning outcomes

At the end of the course you will:

- Understand the way travel insurance operates
- Be able to describe the various aspects and variations of cover
- Understand how travel insurance is sold and regulated.

Who should attend?

This engaging course is for those who have no previous knowledge of travel insurance or who have only recently become involved with it. It will provide a solid grounding in terms of how travel insurance operates.

One day course

Venues/dates	Cost
London: 04 Apr	£140 members £165 non-members
Doncaster: 18 Jul	£125 members
Manchester: 22 Aug	£145 non-members

Technical insurance courses

Introduction to underwriting risk assessment



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

At the end of the course you will:

- Understand more about risk and the way risk is transferred and managed
- Gain insight into how underwriters assess risk and rate it
- Become more aware of surveying methods and how they affect rating
- Understand 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

Venues/dates	Cost
London: 05 May	£140 members £165 non-members
Doncaster: 16 Nov	£125 members
Norwich: 22 Mar	£145 non-members

Introduction to 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

At the end of this course you will have:

- Gained an understanding of yacht risks
- Gained maximum benefit from experienced market speakers
- Obtained 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

Venue/dates	Cost
London: 14 Mar/ 26 May/26 Aug	£140 members £165 non-members

Business and soft skills courses

33 Introduction to assessing the impact of training

33 Introduction to business communication skills

34 Introduction to business development through relationships

34 Introduction to business writing skills

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39 Introduction to motivation and goal achievement

40 Introduction to negotiating skills for brokers

40 Introduction to networking skills for brokers

41 Introduction to personal assertiveness and effectiveness skills

41 Introduction to presentation skills

42 Introduction to problem solving and decision making

42 Introduction to project management

43 Introduction to recruitment and selection

43 Introduction to sales – bringing in more business from clients

44 Introduction to sales – bringing in new clients

44 Introduction to sales – presentations, proposals and tenders

45 Introduction to time management

Business and soft skills courses

Introduction to assessing the impact of training



Overview

It is important for businesses to ensure they get value from any training their staff undertake. This interactive course will show you how to plan, implement and measure your training to ensure it helps meet your business objectives.

Programme

- Conducting training needs analysis effectively
- Designing objectives based training
- Understanding the full costs of training
- Measuring results
- Describe an effective evaluation process.

Learning outcomes

At the end of the course you will:

- Understand how to pinpoint training needs
- Know how to provide a good learning experience
- Understand how to ensure learning is evaluated and implemented
- Understand the ROI methodology model.

Who should attend?

This course will benefit managers, supervisors and team leaders who are responsible for the development and training of staff for the wider benefit of the business.

One day course

Venues/dates	Cost
London: 25 Jan/13 Jun	£140 members £165 non-members
Leeds: 03 Aug	£125 members £145 non-members

Introduction to business communication skills



Overview

This interactive course will examine the vital role communication has within the business, and will equip delegates with the essential skills to effectively communicate in challenging environments. Delegates will learn how their communication style affects certain situations and what they can do to improve this.

Programme

- How we communicate, both consciously and sub-consciously
- How our preferences and outlook affect our communication
- How different pressures and situations affect us
- Overcoming barriers to effective and constructive communication
- How the way we interact with each other affects how we interact with customers
- Techniques and methods of positive communication
- How to listen actively and understand what is actually being communicated
- The benefits of re-evaluating the way we communicate and understanding more about the way we are perceived by others
- The impact on customers, both internal and external, of changing the way we communicate.

Learning outcomes

At the end of the course you will:

- Understand more about what communication really is and the various ways it takes place
- Consider how you might change your ways of communicating
- See the benefits of making positive changes
- Gain the knowledge to make your team more effective.

One day course

Venues/dates	Cost
London: 22 Jul	£140 members £165 non-members
Birmingham: 18 Mar	£125 members
Leicester: 24 Oct	£145 non-members

Who should attend?

This course is suitable for all those looking to improve their communication skills.

Business and soft skills courses

Introduction to business development through relationships



Overview

Business development in the modern world takes place through many channels, not just through dedicated salespeople. Services are bought through effective business relationships and great customer service, just as much as by professional selling.

To make this happen, people need the knowledge and confidence to make the right offers to the right people at the right time. For insurance brokers, they also need to ensure they have offered potential solutions for the risks faced by their clients.

Programme

- Building a relationship through care and interest in your client
- Developing the relationship to gain a deeper understanding of your client's needs and requirements
- How offering a better service should generate more opportunities
- Saving non-productive time to create quality time for your client
- Managing the conversation to keep it focused
- Discussing products and services you're not an expert in
- Asking the important questions at the right time
- Generating leads for potential new business
- Ensuring that something happens with those leads
- Increasing renewal retention by a year-round relationship
- Asking for referrals and business opportunities without embarrassment.

One day course

Venues/dates	Cost
London: 10 Aug	£140 members £165 non-members
Birmingham: 25 May	£125 members
Bristol: 08 Feb	£145 non-members

Learning outcomes

At the end of the course you will be able to:

- Build more effective relationships with clients
- Gain greater insights into client needs
- Explore opportunities for new business
- Help retain current business.

Who should attend?

This interactive course is designed for those who have regular contact with clients and have the ability to help channel new business without becoming a salesperson. It is suitable for people with no business development training who would like to do more for new and existing clients.

Introduction to business writing skills



Overview

During the course of the day, you will learn the essential writing skills to effectively write business documents including reports and letters. You will also learn the benefits of preparation and planning, as well as the effect of vocabulary, tense and sentence structure on the style and tone of the document.

Programme

- The systematic approach and the basic principles of writing
- Preparation for writing – planning, relevance and accuracy, conciseness and clarity
- Your organisation's corporate format, style and guidelines
- Tone and the reader in written communication
- Purpose and intent of the communication
- Who are the audience and what is your desired impact and effect?
- Making sure you communicate your message to your audience
- Sentences, paragraphs and punctuation – good practice and common pitfalls
- Active and passive – grammar and language to convey meaning
- Difficult situations involving written communication
- Difficult, contentious or sensitive situations
- Preparation, arrangement and appearance of your letter, email or web update
- Considering your purpose, audience, frequency and timing
- Planning the content and information requirements
- The report framework and structure, drafting and writing your report
- Action planning.

One day course

Venues/dates	Cost
London: 21 Sep	£140 members £165 non-members
Birmingham: 25 Oct	£125 members
Norwich: 04 Jan	£145 non-members

Learning outcomes

At the end of the course you will be able to:

- Understand when and what type of writing is best for your message
- Clarify your reason for writing a letter, email, or report
- Consider the specific needs of your reader
- Communicate effectively and to a purpose
- Organise your material by sorting it into groups of related facts
- Check/revise your draft so the content and tone are appropriate for the message being sent or the report being created.

Who should attend?

This course is suitable for those who wish to develop their skills in written communication including letters, emails, memos and reports. It will help people who are new to business writing as well as those who wish to perfect their skills.

Business and soft skills courses

Introduction to change management planning



Overview

This useful course explores how we can plan for change and make sure we have thought of everything we will need.

Programme

- A model for strategic change
- Understanding the external and organisational drivers for change
- Change and corporate strategy
- Building the change agenda – where we want to be vs. where we are now
- Identifying the needs for culture change – target vs. current culture
- Stakeholder mapping – identifying the key planner and their needs
- Building the business case for change
- Creating a compelling vision
- The practical tools and techniques for planning change
- Identifying and planning for the organisational and people obstacles
- Aligning policies, systems and procedures to the change effort.

Learning outcomes

At the end of the course you will be able to:

- Understand the key elements of an effective change programme
- Know your roles and responsibilities as leaders in implementing effective change initiatives
- Draw up your own plans to ensure the changes needed by the business can take place.

One day course

Venues/dates	Cost
London: 06 Oct	£140 members £165 non-members
Bristol: 22 Feb	£125 members £145 non-members

Who should attend?

This course is suitable for managers, HR practitioners and anyone who is responsible for implementing, guiding and/or managing change.

Introduction to coaching and developing people



Overview

This course aims to equip managers with the essential skills for promoting high levels of staff competence and performance.

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.

One day course

Venues/dates	Cost
London: 25 Oct	£140 members £165 non-members
Bristol: 20 Jun	£125 members
Edinburgh: 16 Feb	£145 non-members

Learning outcomes

At the end of the course you will be able to:

- 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 your personal coaching style and the actions you can take to enhance your own coaching effectiveness.

Who should attend?

This course will benefit managers at all levels.

Business and soft skills courses

Introduction to customer care



Overview

This insightful course will show delegates just how important great customer service is and how to deliver it.

Programme

- What customer service and customer care really means to us. Delegates relate their personal experiences of service, good and bad, and how they can use these experiences to their advantage
- The importance of listening, and how difficult it is to give 100% attention all of the time whilst dealing with customers over the telephone
- We will also cover questioning, listening and response skills
- The importance our attitude has on the call and the difference between good and bad communication skills
- The importance of making a good first (and last) impression, and how the words we use have specific impact on our customers
- Different behavioural styles likely to be encountered and how to recognise and adapt accordingly.

Learning outcomes

At the end of the course will be able to:

- Understand what customer service really means
- Appreciate the importance of good communication skills
- Acknowledge the importance of having a professional approach to looking after customers.

Who should attend?

Staff at all levels who work in a customer service environment.

One day course

Venues/dates	Cost
London: 23 Nov	£140 members £165 non-members
Cardiff: 11 Jul	£125 members
Manchester: 21 Apr	£145 non-members

Intermediate delegation skills



Overview

This interactive workshop shows how to manage delegation within an organisation to the benefit of individuals and the organisation itself.

Programme

- What is delegation?
- Delegation vs. abdication
- The benefits of delegation – individual, team, organisation
- Fears and concerns of delegating tasks
- Promoting a positive response from your direct report
- What to delegate and why
- How to use delegation to help the organisation to develop
- Common problems with delegation
- Identifying who to delegate to and who not to
- How to delegate effectively
- Action planning.

Learning outcomes

At the end of the course you will be able to:

- Understand what delegation actually is
- Consider the best way to delegate tasks and responsibilities
- Avoid some common pitfalls with delegation
- Plan future delegation to best effect.

Who should attend?

This workshop is suitable for managers at any level who experience challenges delegating effectively or who want to make the most of their team's potential.

One day course

Venues/dates	Cost
London: 09 Dec	£160 members £180 non-members
Doncaster: 09 Feb	£140 members £155 non-members

Business and soft skills courses

Intermediate Excel for brokers



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

At the end of the course you will have:

- Learned how to use advanced formatting and borders
- Learned how to use conditional statements and formatting
- Learned 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

Venues/dates	Cost
London: 12 Sep	£160 members £180 non-members
Birmingham: 28 Jun	£140 members
Doncaster: 09 Nov	£155 non-members
Leeds: 10 Oct	
Norwich: 10 Feb	

Intermediate finance for non-finance managers



Overview

This stimulating course provides insights into how finance works and how essential it is to every organisation.

Programme

- The main aspects of financial accounting
- The structure and construction of the 'balance sheet' the 'profit and loss account' and the 'cash flow statement'
- The financial flows in a business through a simple business model
- The basics of pricing – underwriting an entire account rather than case underwriting
- Financial regulations
- Procurement from a financial viewpoint
- The concept of management accounting
- Methods of budgeting and control
- Simple financial exercises will be used to consolidate the understanding of the financial operating principles.

Learning outcomes

At the end of the course you will be able to:

- Understand what finance is all about
- Recognise the key financial procedures in any organisation
- Understand the main financial facts and figures they are presented with
- Support the management of the finances within your own organisation.

Who should attend?

This course is ideal for managers who are not from a financial and accounting background but would benefit from a basic understanding of key financial documents and processes.

One day course

Venues/dates	Cost
London: 29 Apr/07 Jul/ 15 Sep	£160 members £180 non-members
Manchester: 05 Jul	£140 members
Newcastle: 23 Jun	£155 non-members

Business and soft skills courses

Introduction to leading effective teams



Overview

This motivational 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

At the end of the course you will be able to:

- Identify your individual and team's skills and attributes
- Identify ways that you will support individuals to develop their team skills further

One day course

Venues/dates	Cost
Doncaster: 07 Apr	£125 members
Edinburgh: 09 Jun	£145 non-members
Norwich: 22 Aug	

- Know what team roles are necessary to make a team work well
- Identify your management style
- Coach and develop your team members
- Balance your personal responsibilities with those of being a leader.

Who should attend?

The course will benefit those new to leadership and also those with some existing experience. It should help build confidence to deal with issues as they arise and to inspire their teams.

Introduction to managing difficult customers



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 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 affects 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

At the end of the course you will:

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

Who should attend?

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

One day course

Venues/dates	Cost
Edinburgh: 04 Oct	£125 members
Glasgow: 22 Mar	£145 non-members
Norwich: 27 Jul	

Business and soft skills courses

Introduction to managing high performance



Overview

This course explores ways to maximise the performance of teams or deal with the issues of under-performance by using a range of motivational techniques.

Programme

- How performance management can be a positive experience
- Establishing realistic goals and measuring them
- Balancing organisational needs with the capabilities of the individual
- Ensuring the yardstick for success is clear to all
- Clarifying, communicating and reviewing goals and targets
- Linking group and individual responsibilities to organisational performance
- Understanding the skills, knowledge and attitude required for the organisation's future
- Giving feedback
 - The benefits of feedback – individual, team, organisation
 - Awareness and perception
- Managing reactions
 - Typical responses to feedback and how to deal with them
 - Constructively handling performance and conduct problems
- Disciplinary procedures
 - Informal and formal warnings, interviews and meetings
 - Providing training and support.

One day course

Venues/dates	Cost
Birmingham: 12 Jul	£125 members
Leeds: 22 Jan	£145 non-members
Perth: 22 Nov	

Learning outcomes

- At the end of the course you will be able to:
- Identify, encourage and enhance effective performance management
 - Use the most appropriate performance measurement techniques and systems for each scenario
 - Set the most appropriate goals and evaluate the results
 - Identify and encourage high performers to keep them in the business and help them achieve their potential.

Who should attend?

Anyone responsible for managing the performance of their team, including managers, supervisors and team leaders.

Introduction to motivation and goal achievement



Overview

This inspiring course provides delegates with the knowledge needed to increase motivation within their organisation.

Programme

- What motivates?
- The importance of motivation in a changing environment
- Options
- Motivational theory
- Motivating for change
- Target assessments
- Gaining a better insight into the behaviour of the individual
- The importance of setting clear and realistic objectives
- Action planning.

Learning outcomes

At the end of the course you will:

- Understand the fundamental principles of motivation
- Be able to improve motivation within your team
- Be able to set appropriate goals
- Plan a course of action following the workshop.

Who should attend?

Team leaders and managers at all levels.

One day course

Venues/dates	Cost
Bristol: 05 Sep	£125 members
Leeds: 28 Apr	£145 non-members
Reading: 02 Dec	

Business and soft skills courses

Introduction to negotiating skills for brokers



Overview

This course will help you to plan and prepare for structured negotiation, develop strategies with clear objectives, use appropriate negotiating styles, influence power positions in a negotiation, create an appropriate negotiation climate, actively use verbal and non-verbal communication as well as recognise the most common tactics.

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.

One day course

Venues/dates	Cost
Birmingham: 24 Nov	£125 members
Bristol: 04 May	£145 non-members
Leeds: 23 Aug	

Learning outcomes

At the end of the course you will be able to:

- 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?

This course is designed for brokers and others 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.

Introduction to networking skills for brokers



Overview

Business development in the modern world takes place through many channels, not just through dedicated salespeople. Building a professional network of clients and contacts is an integral part of any role.

Effective networking is about understanding your own strengths and learning how to use these to your advantage in a commercial capacity.

Programme

- The importance and different types of networking
- Communication skills required for networking
- Networking etiquette
- Making connections
- Working a room
- Asking the important questions at the right time
- Networking online
- Maintaining networks and building relationships.

Learning outcomes

At the end of the course you will be able to:

- Appreciate the importance of and different forms of networking
- 'Sell' yourself and your company
- Improve your influencing skills
- Understand communication skills important for effective networking
- Select the correct networking groups and events.

One day course

Venues/dates	Cost
Leeds: 03 Jun	£125 members
Leicester: 19 Jan	£145 non-members
Norwich: 13 Sep	

Who should attend?

This stimulating workshop is suitable for anyone who has regular contact with clients and has the potential to help with business development through networking. It is suitable for people with no business development training who would like to do more for their clients and company.

Business and soft skills courses

Introduction to personal assertiveness and effectiveness



Overview

This course aims to equip you with the skills and confidence to employ an assertive style of interaction and communication in your 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

At the end of the course you will be able to:

- Identify the key elements of effective influence and persuasion
- Develop greater personal impact in the workplace
- Identify 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

Venues/dates	Cost
Bristol: 18 Oct	£125 members
Leicester: 26 Jul	£145 non-members
Norwich: 25 Apr	

Introduction to presentation skills



Overview

This engaging course will show you how to deliver effective presentations to customers and colleagues.

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
- Practising presentation techniques.

Learning outcomes

At the end of the course you will be able to:

- List the ways in which people learn from presentations and identify different presentation styles and techniques
- Plan and prepare for greater presentation impact

One day course

Venues/dates	Cost
London: 07 Nov	£140 members £165 non-members
Leicester: 15 Jun	£125 members
Norwich: 10 May	£145 non-members

- 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?

This course is designed for managers, team leaders or staff who deliver presentations either internally or to external customers or suppliers. The workshop provides a safe environment for learning and feedback.

Business and soft skills courses

Introduction to problem solving and decision making



Overview

This interactive course will provide insights and techniques for solving problems and making decisions.

Programme

- The elements of an effective problem solving and decision making process
- Defining the problem, clarifying outcomes, identifying and exploring alternatives, choosing a strategy, implementing it and managing the follow up
- The merits of group and individual problem solving
- Balancing intuition and analysis, creativity and logic, 'gut feel' and 'hard facts'
- Problem solving and decision making tools and their application in the workplace, including:
 - Root cause analysis
 - Decision tables and decision trees
 - Nominal group technique
 - Matched pairs analysis
 - Force field analysis
 - Cause and effect
 - Payoff/implementation grids
 - Affinity diagrams and meta planning
- Observing and understanding the group decision making process
- How to observe different influencing strategies in group discussions and their pro's and con's
- Different types of power and how they are used, either to good effect or to the detriment of the group and/or decision
- What is consensus, when is it the best strategy and what actions can the leader take to create the conditions for true consensus?

One day course

Venues/dates	Cost
London: 18 Jan	£140 members £165 non-members
Leeds: 09 Dec	£125 members
Leicester: 11 Aug	£145 non-members

- Facilitation skills – how to facilitate a group problem solving discussion
- Understanding your preferred way of approaching problems and decisions.

Learning outcomes

At the end of the course you will be able to:

- Describe the key elements in effective problem solving and decision making
- Select and use practical tools for defining, clarifying and solving problems
- Draw on a range of interpersonal skills and techniques to promote effective group problem solving and decision making
- Create and implement a personal action plan to enhance the effectiveness of your workplace problem solving and decision making.

Who should attend?

This course will benefit delegates from all roles and levels.

Introduction to project management



Overview

The course takes a pragmatic approach to using a structured project methodology in areas of complexity and uncertainty and to develop processes, skills and tools to successfully manage projects.

Programme

- Personal competencies required by project leaders/managers
- Setting and agreeing objectives, scope and constraints
- Why projects fail and how to avoid failure
- Managing expectations of those with a primary interest in the project
- Manage schedules, resources, and costs
- Essential planning tools and techniques
- Identify the necessary resources for the project
- Working closely with your project sponsor
- Making time and cost estimates realistic
- Building the team – the roles and responsibilities of the sponsor, steering group, manager, team members and 'project support'
- Managing stakeholders – identifying the project's stakeholders and their needs, and promoting their commitment
- Send information and tasks to the right people at the right time
- Project documentation and provision of data to stakeholders
- Risk management tools and techniques which are easy to use
- Evaluate a project's success and increase the success of future projects.

One day course

Venues/dates	Cost
London: 21 Apr	£140 members £165 non-members
Norwich: 02 Nov	£125 members £145 non-members

Learning outcomes

At the end of the course you will be able to:

- Plan projects effectively and anticipate the requirements of each project
- Assess the resources needed and make sure they are there at the right time
- Create successful project teams and control their activities
- Communicate efficiently with all those who affect their project
- Evaluate each project's outcomes and learn from them.

Who should attend?

This course is for anyone who manages projects as part of their role.

Business and soft skills courses

Introduction to recruitment and selection



Overview

This course will help individuals gain the skills and techniques essential to conducting successful selection interviews.

Programme

- The opportunities presented by a vacancy
- Using a job and person specification to identify key features of the job against which to match job applicants
- Identify key competencies needed to be able to do the job
- Successful interviewing – planning and questioning techniques
- Questioning, listening, observing, body language and note taking
- The sequence of the interview
- Use of behavioural questions to elicit the right information
- Opening, closing and managing the interview
- Evaluation of applicants and decision making
- Recruitment and equality and diversity
- Avoiding conscious and subconscious discrimination
- Summary, review and personal action plans.

Learning outcomes

At the end of the course you will be able to:

- Plan and prepare for a selection interview
- Interview and select potential employees with greater confidence
- Control the interview and use open and closed questions to gain a better understanding of the interviewee
- Review the information gained, evaluate the results and make the best decision
- Appreciate the basics of employment law as it affects recruitment.

One day course

Venues/dates	Cost
London: 10 Feb	£140 members £165 non-members
Belfast: 30 Aug	£125 members
Perth: 24 May	£145 non-members

Who should attend?

Anyone responsible for conducting recruitment interviews, including managers, supervisors and team leaders.

Introduction to sales – bringing in more business from clients



Overview

This course is for anyone who wants to learn how to maximise their relationships with clients ensuring that their clients are fully aware of the services and products provided by your business. The course will help build delegates' confidence and skills so that they can fully connect with their clients.

Programme

- The type of business culture in which sales flow naturally
- Identifying when existing clients are ready to buy more
- The times sales opportunities present themselves in day to day business
- How to present reports and proposals to best effect and how to give existing clients useful information about products and services
- How to widen the clients' perception of our business to include new products and services
- How to maintain rapport with clients and keep your business in their minds
- How to take the fear out of asking for more business from existing clients
- Building confidence in people whose primary role is not to sell.
- There will be opportunity to practise some new skills and to prepare individual actions plans to make the most of new skills and ideas.

Learning outcomes

At the end of the course you will be able to:

- Help create a business culture where selling is natural
- Identify the opportunities to sell to existing clients

One day course

Venues/dates	Cost
London: 25 Feb	£140 members £165 non-members
Birmingham: 09 Aug	£125 members
Newcastle: 19 Apr	£145 non-members

- Effectively present reports and proposals to existing clients
- Take every opportunity to enhance clients' awareness of what your business can do for them
- Build confidence to spot and follow up the buying signals
- Practise new skills and plan to use new ideas.

Who should attend?

This course is for anyone who wants to learn how to connect with their clients to better effect. It is not just for managers or sales staff but is for anyone who wants to develop their client relationships.

Follow-on courses

- Introduction to sales – bringing in new clients, see [page 44](#)
- Introduction to sales – presentations, proposals and tender, see [page 44](#).

Business and soft skills courses

Introduction to sales – bringing in new clients



Overview

This engaging course considers the techniques and confidence needed to make the most of customer relationships and bringing in new business.

Programme

- Why people buy and how they prefer to do this
- How to make the most of leads coming into the business
- The importance of preparation in effective sales
- How to present reports and proposals to best effect, how to answer questions and give the potential client confidence in our answers
- How best to make use of the advantages our products have over others
- How to communicate effectively and the importance of attitude and questioning skills
- Identifying the main objections to buying and how to overcome these
- How to close sales rather than leaving things open-ended
- There will be opportunity to practise some new skills and to prepare individual actions plans to make the most of new skills and ideas.

Learning outcomes

At the end of the course you will be able to:

- Understand how and why people buy
- Follow up potential leads effectively
- Effectively present reports and proposals to potential clients
- Make best use of the features and benefits of your products
- Deal effectively with objections
- Close sales more effectively
- Practise new skills and plan to use new ideas.

One day course

Venue/dates	Cost
London: 10 Mar/ 19 Apr/02 Sep	£140 members £165 non-members

Who should attend?

This workshop is for those who have an involvement in business development and wish to help open new doors and bring in new prospects to the business.

Follow-on courses

- Introduction to sales – bringing in more business from clients, see **page 43**
- Introduction to sales – presentations, proposals and tenders, see **opposite**.

Introduction to sales – presentations, proposals and tenders



Overview

This interactive course provides the techniques and confidence needed to communicate effectively with prospective new clients.

Programme

- Designing, writing and submitting new business proposals
- Managing the tender process and meeting the requirements of the prospective client
- Understanding how to set objectives for a presentation and what is to be achieved
- Delivering presentations to external or internal clients
- Planning and preparing for a presentation
- How to structure and design a presentation
- Opening the presentation and breaking the ice
- Key skills in delivering a presentation and handling audience reaction
- Speaking with confidence
- Closing the presentation and next actions.

Learning outcomes

At the end of the course you will be able to:

- Write an effective proposal to a prospective client
- Submit tenders which meet the needs of the prospect
- Design and deliver presentations to new prospects
- Follow up and ensure leads are not lost.

Who should attend?

Those who are involved in sales who wish to make best use of proposals, client presentations and the tender process.

One day course

Venues/dates	Cost
London: 29 Mar/23 May	£140 members £165 non-members
Doncaster: 06 Sep	£125 members £145 non-members

Follow-on courses

- Introduction to sales – bringing in more business from clients, see **page 43**
- Introduction to sales – bringing in new clients, see **previous**.

Business and soft skills courses

Introduction to time management



Overview

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

One day course	
Venue/dates	Cost
London: 03 May	£140 members £165 non-members

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

At the end of the course you will be able to:

- Manage your own time and the time of others
- Prioritise your 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.

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