

The 2016 Life, Pensions and Long Term Savings Professionalism Commitment

Becoming a Professional
Standards Signatory

www.cii.co.uk/2016-commitment



CII

The 2016 Commitment encourages any organisation that has customer contact through the provision or administration of Life, Pensions or Long Term Savings products to commit to a common framework of professional standards, and to implement these standards by the end of 2018.

By signing the 2016 Commitment and embarking on this journey, your organisation joins the vanguard of the sector, publically addressing consumers' expectations for visible leadership in professional standards.

Developed in conjunction with an employer steering group, comprising senior sector leaders, the 2016 Commitment is a practical, flexible framework that embeds professionalism across the sector.

Firms need to meet the following objectives and measures of company-wide professionalism before the end of 2018.

Policies

All signatories to operate policies that:

- encourage high quality standards of customer service
- embed the principles of TCF and wider ethical conduct
- demonstrate a commitment to career development.

People development

All signatories to ensure that staff participate in formal development programmes, which:

- underpin career development and raise professional standards
- support the development of knowledge, skills and expertise
- lead, where relevant, to a professional qualification.

PROFESSIONAL
STANDARDS
SIGNATORY



Professional standards

All signatories to embed the following measures of professional capability:

Leaders

To hold professional qualifications where appropriate

All to hold membership of an appropriate professional body and commit to CPD

Managers

All working towards becoming Diploma qualified or equivalent
Minimum Certificate-level qualification or equivalent

Senior technical roles

All working towards becoming Diploma qualified or equivalent

Customer facing staff and team leaders

The majority working towards Certificate-level or equivalent qualification

All new joiners to complete Award-level qualification or equivalent, committing to a code of ethics and CPD within 12 months of joining

A framework, not a rulebook

The 2016 Commitment recognises the diversity of the sector. Consequently, the framework sets out broad principles and invites you to consider how they should be applied to your business.

For more information on the 2016 Commitment, including FAQs, visit www.cii.co.uk/2016-commitment

Signing up to the 2016 Commitment

Signing up your organisation to the 2016 Commitment is straightforward. Individuals in a responsible position, acting on their firm's behalf, simply need to:

- ensure they have read and understood the Commitment standards;
- commit their firm publicly to embedding these standards in full by the end 2018; and
- complete the sign up form below.

Firm details

Name of organisation

Address

Website

Designated firm contact

Name

Job Title

Telephone no

Email

By ticking the box you confirm that you are signing your firm up to the 2016 Commitment*

Please fill in all fields and email your completed form to steve.jenkins@cii.co.uk 

By signing up to the 2016 Commitment, organisations assume responsibility for embedding these standards in full by the end 2018.

Organisations that have signed up to the 2016 Commitment are featured on the CII website at www.cii.co.uk/2016-commitment (this includes company name and web address). They may also be included in our ongoing communications regarding this initiative.

If you have any questions regarding the 2016 Commitment or anything relating to your application, please contact Steve Jenkins by emailing steve.jenkins@cii.co.uk