

CII Broker Academy

Just what the
broker ordered...



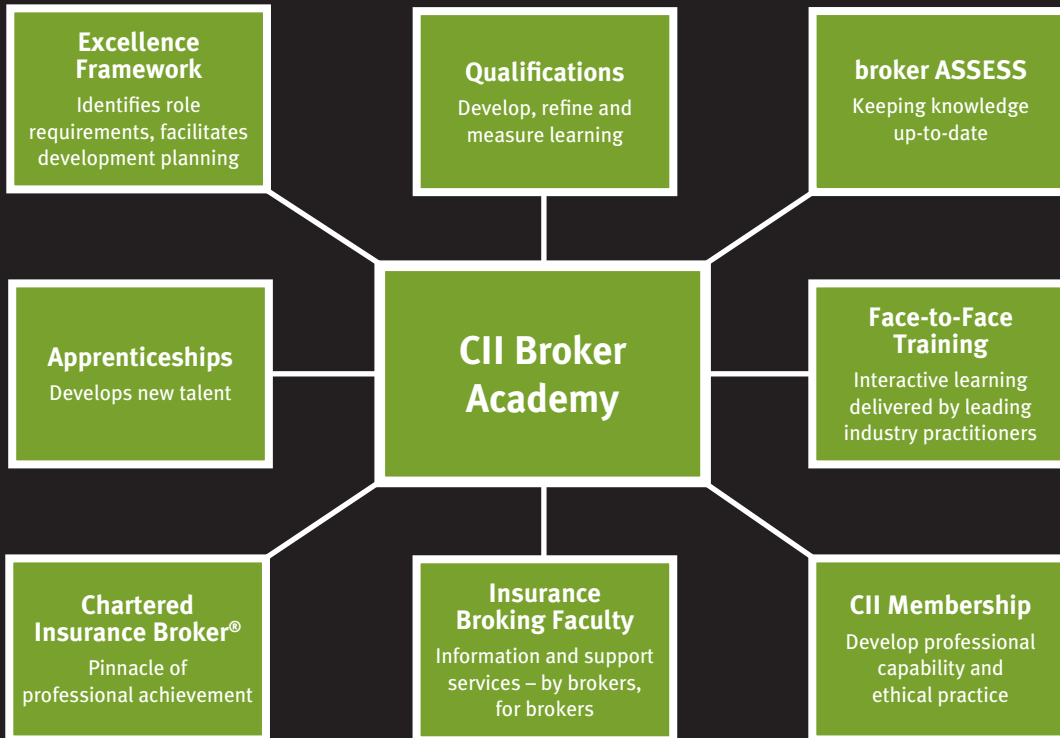
working in partnership with:



Insurance Broking Faculty



CII



The essential package to help accelerate professional development

You don't need telling how demanding the broker market is. Intense competition. A weighty regulatory burden. Consolidation. New distribution channels. It's tough out there.

So how do you respond? How do you secure your career prospects and contribute to the success of your firm?

The answer is a step-change in professional standards. And that's where the Broker Academy comes in.

The best way to survive and flourish in harsh market conditions is to raise levels of knowledge, capability and ethical practice. It's time for the professionals to become more professional.

The Broker Academy provides a one-stop-shop training and development facility. Developed by the CII, BIBA and AXA, it is a long-term strategic solution devised by the industry, for the industry. It will help you sharpen your competitive edge, improve your service to clients and enhance your regulatory compliance.

www.cii.co.uk/brokeracademy

Access the Broker Academy online at www.cii.co.uk/brokeracademy and you can plug into an unrivalled range of broker-specific training solutions as shown opposite and outlined in more detail in the following pages.

Many individual brokers and small- to medium-sized broking firms use the Broker Academy as a source of practical assistance and support – in effect, as a virtual training partner. Larger firms typically use it to complement in-house training activity.

This guide gives you an overview of the services currently on offer from the Broker Academy.

“A key factor in our continued success at Oyster Risk Solutions is the personal and professional development of our business managers. We attained Chartered Status in 2008, and as part of this effort we have put in place a study programme via Broker Academy to ensure all customer-facing staff have a recognised CII qualification by the middle of 2009. We are also enthusiastic users of broker ASSESS, which is invaluable in addressing training and compliance requirements.”



Martyn Aldridge, Dip CII
Business Manager
Oyster Risk Solutions Limited
Chartered Insurance Brokers

Excellence Framework

Using the FREE Excellence Framework, you can identify the skills, knowledge and abilities needed to perform a broad range of broker job roles. You can then assess your own situation or those of your team against these benchmarks to create individual competency profiles.

Here's how it works:

- You select the relevant job role and view descriptions of the key competences needed to perform it successfully.
- Each competency has a rating ranging from basic understanding through to the application of expert knowledge.
- To assist development activity, each competency is matched against training solutions located within the Broker Academy.

The Excellence Framework therefore allows you to identify which training solutions are appropriate for any given role.



www.cii.co.uk/brokeracademy

Qualifications

The CII provides market-led qualifications that serve all sectors of the broking industry and cater for all levels of knowledge and experience.

Qualifications range from the introductory-level study programme, the Foundation Insurance Test, to the industry's leading professional qualification, the Advanced Diploma in Insurance, and, ultimately, Chartered Insurance Broker status.

Covering all areas, from basic facts and general principles to highly specialised classes of business, this market-renowned qualifications programme helps individuals establish a foundation of technical knowledge upon which to build a successful insurance career.

The modular structure of the qualifications framework offers great flexibility and enables candidates to develop individual learning routes matching their career expectations and requirements. They do this by choosing different units from the 44 available across the framework, including specialist broking units.

Brokers holding qualifications can apply to use industry-recognised designations:

- Certificate in Insurance – ‘Cert CII®’;
- Diploma in Insurance – ‘Dip CII®’;
- Advanced Diploma in Insurance – ‘ACII®’/ ‘Chartered Insurance Broker®’, and
- Fellowship – ‘FCII®’.

All designation-holders participate in the CII's Continuing Professional Development (CPD) scheme to help maintain and enhance competence and assist with career development.

“At Perkins Slade, we ensure we treat our customers fairly and deliver exemplary advice by pursuing professionalism at all levels. To achieve this, our people are provided with the in-depth training they need to acquire and maintain high levels of technical expertise and people skills. CII qualifications play a vital role in each individual's development, both in their current role and as they progress their career.”

[perkins-slade](https://www.perkins-slade.com)

Ian Crawford, FCII
People Development Manager
Perkins Slade Ltd

broker ASSESS

This is a comprehensive online training and competency tool, with content designed and written for brokers by broking experts.

broker ASSESS is continually updated to provide the most current learning and assessment tools. Technical, market and regulatory issues are all covered, allowing brokers to enhance their skill-set and professional capability and, crucially, meet regulatory training and competence requirements, which require staff to be, and remain, competent to do their job.

broker ASSESS:

- assesses employees' knowledge and understanding, providing objective measures of levels attained;
- identifies gaps so that compliance with training and competence requirements can be continuously reviewed and maintained;
- delivers access to an unrivalled range of broking-specific learning content, helping address knowledge gaps and keep knowledge up-to-date;

- provides a robust management information system for record-keeping and reporting purposes. The reports within the system have been designed by compliance specialists to support competence validation.

To obtain your free, no obligation, 14 day trial of broker ASSESS call 020 7397 0224 today.



“It was a very busy time getting ready for the FSA TCF Assessment meeting, many hours were spent in preparation. The one area that was easy to evidence was the training and competence, thanks to broker ASSESS. Literally within minutes all the reports for company qualifications, CPD activity, training records and competency testing were collated and printed for the FSA.”



FOSTER LEIGHTON

Rod Fry, Dip CII
Director

Foster Leighton & Co Ltd

Face-to-Face Training

The Broker Academy's training programme delivers a mix of key technical, business, management and sales courses at 18 locations across the UK.

Conceived and developed following regional consultation with brokers, the face-to-face format ensures a stimulating and rewarding learning environment to sharpen broking skills and enhance career potential.

The regional programme, delivered by Searchlight Insurance Training, offers high-quality training at affordable prices, with courses typically starting from only £99.

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

See what our customers think...

“even after my years in the industry I still found it very useful”

Liverpool delegate

“great trainer and interesting content”

Birmingham delegate

“very productive and informative”

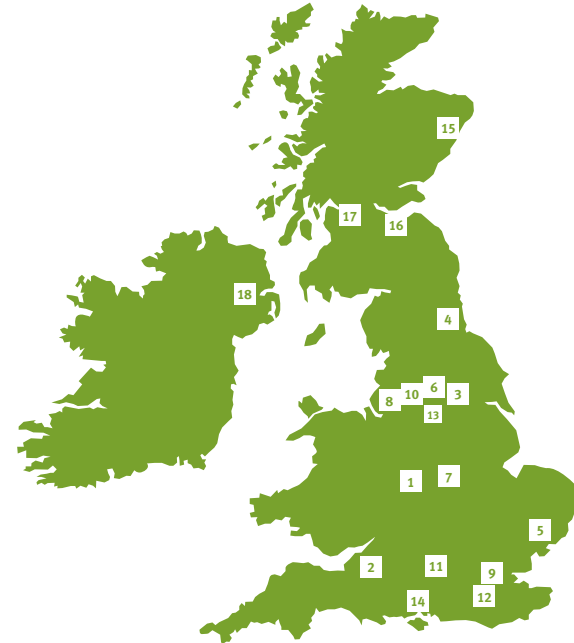
Glasgow delegate

“the feedback from my team has been excellent”

UK national broker

In addition to the regional training programme, there is also an extensive programme of more than 400 courses delivered by the CII in London at our Fenchurch Street premises.

These include introductory courses, a comprehensive programme of technical courses covering all key classes of business, and many specialist courses, including Lloyd's and the London Market, together with the UK's largest programme of CII exam revision courses proven to increase the chances of exam success by up to 60%.



| | | | | | |
|---|------------|----|------------|----|-------------|
| 1 | Birmingham | 7 | Leicester | 13 | Sheffield |
| 2 | Bristol | 8 | Liverpool | 14 | Southampton |
| 3 | Doncaster | 9 | London | 15 | Aberdeen |
| 4 | Durham | 10 | Manchester | 16 | Edinburgh |
| 5 | Ipswich | 11 | Reading | 17 | Glasgow |
| 6 | Leeds | 12 | Redhill | 18 | Belfast |

The lifeblood of the broking profession



CII Membership

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

Membership of the CII signals a desire to develop broad professional capability and subscribe to the standards associated with professional status.

CII members are able to drive their personal development and maintain their professional standing by adhering to the Institute's Code of Ethics & Conduct and through an unrivalled range of learning and career services, including:

- Technical and regulatory updates
- Professional development events
- Market sector information and guidance provided through the Insurance Broking Faculty
- Discounts on CII products and services
- Designatory letters and titles, including Chartered Insurance Broker status, available upon qualification, helping holders to demonstrate their professionalism
- Continuing Professional Development.

Insurance Broking Faculty

Crucial to the Broker Academy concept is that the entire initiative is shaped by the broker community – it is by brokers, for brokers. This is why we created the Insurance Broking Faculty for CII members.

Brokers are encouraged to communicate with the CII's Insurance Broking Faculty Board through a variety of communication channels. As the Faculty Board is made up of practising brokers, this means they are working with their peers to ensure Broker Academy reflects the needs of the sector.

The Faculty Board then works with the CII to develop the products and services that make Broker Academy a vibrant, relevant resource for use by all brokers.

“At the Bartlett Group, we pride ourselves on the professionalism of our staff, as demonstrated by their technical knowledge and ethical approach. CII membership underpins our commitment to personal development, supporting completion of qualifications, and its Code of Ethics & Conduct provides a framework for good practice. Membership also provides evidence of commitment to professionalism through designatory titles and letters, including our corporate Chartered Insurance Brokers status.”

Bartlett
CHARTERED INSURANCE BROKERS

Steve Riddick, FCII
Vice Chairman
Bartlett Group Ltd
Chartered Insurance Brokers



Chartered Insurance Broker status

For individuals

To recognise the commitment of individual brokers to the highest level of professional self-development and practice, the CII introduced the title of 'Chartered Insurance Broker'.

Holders must have passed the Advanced Diploma in Insurance or equivalent, attained specified levels of industry experience and satisfied Continuing Professional Development requirements. To-date over 2,300 individual brokers have attained this title, with many more working towards it.

Chartered status enables an individual to demonstrate their professionalism to customers, peers, employers and the regulator.

For firms

To support leading firms in the broking sector, and to recognise their adherence to the highest standards of professional practice, the CII has introduced the corporate title 'Chartered Insurance Brokers'.

This corporate Chartered status reinforces the importance of professionalism in a fast-moving and competitive market. It also helps place broking firms on a par with other professional advisers, such as accountants and solicitors.

Chartered status is well established as a trusted symbol of professionalism. It carries weight with other professional organisations and distinguishes broking firms from their competitors and peers.

It also helps firms attract and retain the best staff. Talented professionals want to work for ambitious, principled organisations, and corporate Chartered status is a clear indicator of the professional standing of a potential employer.

Apprenticeships

Apprenticeships are practical learning programmes delivered in the workplace for people over the age of 16 who do not hold a degree, and any type or size of broker can participate in the scheme.

They address skills gaps and shortages and crucially attract substantial funding. This means that they can be provided either at no cost to the employer, or with minimal outlay.

Brokers can access the Apprenticeship and Advanced Apprenticeship in Providing Financial Services. They are vocational training programmes that help new or inexperienced broking staff to develop key skills.

Apprenticeships are completely free for 16-18 year olds, with full funding typically provided for those aged 19 and above. Programmes usually last between 9 and 24 months according to individual requirements.

Each programme has four components:

- Technical, e.g. unit(s) from the Certificate in Insurance
- Competence, e.g. National Vocational Qualification (NVQ) in Retail Financial Services
- Externally assessed or embedded key skills that assess communication and numeracy
- Employer rights and responsibilities, embedded in the induction programme.

At the end of an Apprenticeship, learners receive a professional qualification (such as the Certificate in Insurance), a competence qualification (such as the NVQ in Retail Financial Services), a literacy and numeracy qualification (Key Skills) and a completion certificate.

With inevitable pressure on training budgets, apprenticeships are an ideal way for employers to derive maximum value from their spend, benefiting their own business and enhancing the general levels of skills and professionalism across the market.

“In these uncertain times Brunsdon LLP are promoting professionalism and confidence in a long term career to new recruits by engaging in Apprenticeship schemes containing CII qualifications. These Apprenticeships, which are fully or part funded, are a cost effective way for brokers to provide quality education and vocational training, and a professional career for their employees. A much welcome addition to the CII Broker Academy portfolio.”



Ian Dickinson, Cert CII
Projects & Integration Manager
Brunsdon LLP

Broker Academy delivers a host of benefits:

- **Competitive edge** – improves competitiveness by maximising potential, channelling ambition and nurturing talent.
- **Personal development** – provides effective training to enhance performance and help attract and retain talent. Facilitates the creation of individual career plans, aligning Broker Academy products and services to specific, identifiable training needs.
- **Compliance** – helps to ensure your firm is fit for purpose, demonstrating commitment to staff development and compliance with training requirements.
- **Convenience** – time and cost savings are achieved by having access to a full range of services in one place and from a single supplier.
- **Quality-assured solutions** – delivers services developed by the CII and endorsed by leading industry bodies, insurers and brokers.
- **Supports best practice and customer service** – develops technical understanding to underpin the provision of appropriate, timely advice and support.
- **Responsive** – meets the changing needs of the market, enabling users to keep abreast of emerging issues and new challenges.

For full details on all the services listed in this leaflet visit www.cii.co.uk/brokeracademy

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