

2024 Q4

Technical, Business & Management Skills Workshops





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Engaging & Motivating the Team

All Levels | 3 x CPD Hours

Suitable For:

Suitable for managers and team leaders.

The aim of this virtual live training is to raise awareness and understanding of the key characteristics of an effective team by focusing on how to set the environment for individual and team engagement with a focus on positive psychology.

Course Details

Webinar delivery



Date: 1st October 2024

Time: 9:30am -12:45pm

Price: £50 +VAT

Standard Objectives

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

- Know your role and responsibility in terms of motivating and engaging the team
- Know the key drivers for employee engagement
- Understand the importance of positive psychology on influencing motivation and engagement.

Workshop Content

- The role of management in the context of motivation and engagement
- Your team challenges
- What is motivation?
- Tried and tested models
- What drives employee engagement?
- 3 core beliefs of engaged workers
- Positive psychology for improved motivation, performance and engagement
- Simple questions to test motivation and engagement
- Action plan and review



Microsoft Outlook Productivity and Efficiency

All Levels | 3 x CPD Hours

Suitable For:

For existing users of Outlook that want to achieve better results, without being held back by large volumes of email.

This webinar covers time management and efficiency tools built into Outlook as well as the integration with Teams.

Course Details



Webinar delivery

Date: 3rd October 2024

Time: 9:30am -12:45pm

Price: £50 +VAT

Standard Objectives

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

- Use Outlook to Manage Emails in an Efficient Manner
- Get The Most Out of Calendar and Tasks
- Using Search Folders, Rules and Follow Up flags to Reduce Workload

Workshop Content

- Follow up Flags and Reminders
- Using the Draft Folder
- Search Folders
- ♦ Actions Resend / Recall
- ◆ Tasks
- Calendar Scheduling Events and Teams Meetings
- Email to Meeting / Appointment to Email



Construction Insurance

Intermediate Level | 3 x CPD Hours

Suitable For:

Suitable for those with some practical experience of handling or placing contract works insurance

This workshop provides a structured overview of the subject which will act as either a learning opportunity for those less experienced or a refresher for the more experienced

Course Details

Webinar delivery



Date: 8th October 2024

Time: 9:30am -12:45pm

Price: £50 +VAT

Standard Objectives

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

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

Workshop Content

- The need for separate insurance, Risks/property insured, Ways cover can be arranged, Parties and terminology
- Contract Conditions: Parties involved, Insurance requirements for Works & Plant under JCT standard form of contract, JCT Minor Works
- Policy Cover Contract Works: Usual cover, exclusions, extensions, Common alternatives, Maintenance cover, Defects exclusions
- Placing and Rating Risks: Key insurer information needs, Good risks and bad risks, Contract works pricing



Commercial Property Insurance

Intermediate Level | 3 x CPD Hours

Suitable For:

Suitable for those with at least 12 months' commercial property insurance experience.

This workshop explores commercial property insurance in greater depth, and explores at typical commercial property cover, terms, conditions and exclusions.

Course Details

Webinar delivery



Date: 10th October 2024

Time: 9:30am -12:45pm

Price: £50 +VAT

Standard Objectives

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

- Explain in detail the main features of a risk that would influence an underwriter in their assessment
- Describe the effect physical features of a risk can have on rating that risk
- Outline the main causes of fire losses in the UK
- Detail the typical policy cover provided by commercial property policies
- Explain risk management features of a risk and explain to a customer what steps they can take to reduce or eliminate the possibility of loss

Workshop Content

- Reasons why Commercial Property insurance is purchased
- The factors involved in the assessment of risk
- The principles and application of underwriting
- The different cover levels available
- The main conditions, exclusions, restrictions and extensions
- The factors involved in the risk management
- The principles of claims notification, processing and settlement





General Data Protection Regulations

All Levels | 3 x CPD Hours

Suitable For:

This online General Data Protection Regulation (GDPR) training course is suitable for any employee responsible for handling personal data, and is particularly useful for those managing or accessing databases.

Course Details

Webinar delivery



Date: 16th October 2024

Time: 9:30am -12:45pm

Price: £50 +VAT

Standard Objectives

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

- Understand the key principles of the General Data Protection Regulation.
- Learn how to handle data with integrity and confidentiality.
- Be aware of how GDPR affects your role and what your data responsibilities are.

Workshop Content

- ♦ The purpose of data protection and its terminology
- ♦ The obligations placed on companies by the Data Protection Act and the
- General Data Protection Regulations
- The principles of data protection and explains the GDPR's 6 legal bases for processing data
- The eight rights individuals have under the GDPR
- Situations when more stringent data protection considerations apply
- How accountability and governance can assist and demonstrate compliance and explains how data protection risks can be managed effectively.



Contractor's Liability Insurance

Intermediate Levels | 3 x CPD Hours

Suitable For:

This participative workshop covers the liability aspects of JCT contract conditions as well as general liability, with a focus on the contracting trades.

Whilst no previous construction insurance experience is required, a good grounding in the basics of commercial property and liability insurance is essential.

Course Details

Webinar delivery



Date: 22nd October 2024

Time: 9:30am -12:45pm

Price: £50 +VAT

Standard Objectives

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

- Explain the difference between contractual obligations and insurance requirements
- Describe the content of the insurance clauses within the JCT contract relating to liability risks.
- Explain why non-negligence cover may be required and how insurers meet this need
- Describe the standard structure and content of contractor's liability insurance policies, including standard extensions and exclusions

Workshop Content

- The legal environment for contractors common law/ tort, statutory, contract
- Health & Safety legislation including the Construction Design and Management Regulations 2015
- Insurance content (works and liability) of common contract forms – JCT Standard, Intermediate, Minor Works and Sub-Contract forms
- Non-negligence cover what is required and why insurance solutions
- Usual liability policy wordings for contractors EL,
 PL, basic cover, exclusions, common extensions
- Related covers, e.g. financial loss, professional indemnity, directors and officers, environmental impairment



Binding Authority Management

Introduction level | 3 x CPD Hours

Suitable For:

Suitable for staff from underwriting, broking and claims disciplines who are involved with the operation and management of binding authorities.

This binding authority management training workshop provides an analysis of the procedures and practices of delegated underwriting and claims authorities in relation to binding authority management. It considers some of the problems that can arise and their solutions. The workshop is generic in nature and applies to all classes of binding authority business.

Course Details

Webinar delivery



Date: 31st October 2024

Time: 9:30am -12:45pm

Price: £50 +VAT

Standard Objectives

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

- Understand how the basic legal principles of insurance contracts apply to binding authorities
- Be aware of the roles of the parties involved
- Understand how the market is regulated in relation to binding authorities
- Understand how claims are managed
- Be aware of best practice issues. Third party administration

Workshop Content

- The advantages of binding authorities and types of binding authority
- Cover holder selection considerations
- Modifications to basic principles; utmost good faith and disclosure
- What they can tell us: premium and claims bordereaux
- Claims issues and management:
 - Claim funds
 - Loss adjusters and lawyers
 - Use and regulation of third party administrators
- Role and responsibilities of the cover holder, the broker and the underwriter
- Best practice procedures:
 - Business conduct reviews
 - Audit processes and issues (hot and cold inspection)
- Third party administration.



High Net Worth Insurance

Introduction Level | 3 x CPD Hours

Suitable For:

This interactive one-day High Net Worth training workshop looks at how this class of insurance builds on the insurance covers available as standard, in particular household insurance policies.

This session also looks at the special features of High Net Worth and how these influence the acceptance and pricing of risks.

Course Details

Webinar delivery



Date: 6th November 2024

Time: 9:30am -12:45pm

Price: £50 +VAT

Standard Objectives

- Understand the potential market for high net worth business and its importance in relation to other classes of business – recognise a typical High Net Worth customer profile
- Define the additional covers that are offered under a High Net Worth policy compared to standard policy cover
- Compare High Net Worth policy covers, conditions and exclusions
- Understand the standard underwriting features for High Net Worth risks, e.g. proposer, location, sums insured etc.
- Understand the underwriting and pricing of risks unique to High Net Worth customers, e.g. valuables, wines, collections etc.
- Outline additional covers available to High Net Worth customers, e.g. travel
- Outline the concept of risk management and its application, with regard to underwriting and surveys for High Net Worth risks, e.g. security
- Recognise the importance of satisfactory claims settlement for High Net Worth customers

Workshop Content

- Defining a High Net Worth customer
- Standard underwriting risk factors, e.g. Proposer, Location of Buildings, Contents etc.
- High Net Worth policy covers, conditions and exclusions
- Specific High Net Worth risks
- The concept of risk management and its application to High Net Worth risks
- The principles and procedures for handling High Net Worth insurance claims



Cyber Risks Insurance

Introduction Level | 3 x CPD Hours

Suitable For:

This workshop looks at the cover provided by both conventional insurance covers and those specifically designed to protect against cyber risks.

Although no specific cyber risk insurance knowledge is required, a good level of general property and liability knowledge is recommended.

Course Details

Webinar delivery



Date: 7th November 2024

Time: 9:30am -12:45pm

Price: £50 +VAT

Standard Objectives

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

- Identify which types of customer could benefit from insurance against cyber risks
- Describe the extent of cover provided by conventional insurance policies against cyber risks
- Describe the policy cover, conditions and exclusions of specialist cyber risks insurance policies in the UK
- Outline the major risk, underwriting and rating considerations of cyber risks insurance
- Outline the main considerations when dealing with cyber risks insurance claims

Workshop Content

- What are cyber risks?
- What types of organisation are exposed to cyber risks?
- The cover provided by conventional insurance policies against cyber risks
- The cover, conditions and exclusions of specialist cyber risks insurance policies in the UK
- Liability
- System damage
- Business interruption
- How cyber risks policies relate to other covers such as professional indemnity and crime
- Insurers' information requirements and underwriting considerations for cyber risks insurance
- The main considerations when dealing with cyber risks insurance claims



Business Interruption Insurance

Intermediate Level | 3 x CPD Hours

Suitable For:

This workshop is ideal for those with more than two years' experience of handling business interruption insurance as a separate class of business, as it provides a more detailed study of some of the more complex features of business interruption insurance.

The workshop examines all the main aspects that need to be mastered by those involved in placing or underwriting this class of business.

Course Details

Webinar delivery



Date: 12th November 2024

Time: 9:30am -12:45pm

Price: £50 +VAT

Standard Objectives

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

- Understand how to effectively overcome the main problems in handling this class of business
- Understand how a gross profit figure is derived from a set of accounts
- Explain in detail the workings of the standard gross profit, revenue and fees policy covers and definitions and demonstrate how these are used to select the most appropriate cover
- Thoroughly understand the difference between the declaration linked and traditional methods of forecasting the amount to be insured and recognise the pros and cons of both
- Explain in detail the business features that affect how to set an appropriate maximum indemnity period and understand the implications of selecting an inappropriate period
- Explain how a simple claim is settled
- Explain the cover available under some of the main extensions, including damage occurring away from the customer's premises

Workshop Content

- A detailed look at the main barriers to handling this class of business
- Covers available gross profit, revenue, fees, increased cost of working and additional increased cost of working
- The main elements of the policy wording extent of cover, important conditions, exclusions and clauses
- How to select the correct figures from a set of accounts and then project them forward using the declaration linked and traditional (sum insured) methods
- The features of a risk that have a bearing on the setting of the maximum indemnity period and how these affect the underwriter's assessment of EML
- How risk assessment and rating is influenced by the information obtained
- The principles of claims handling and the role of the loss adjusted
- Extensions commonly requested



Complaints Communication

All Levels | 3 x CPD Hours

Suitable For:

Claim handlers of all levels of experience and other operational staff who may benefit from enhanced complaint handling skills.

This workshop is designed to provide the tools to enable the complaint handler to achieve the objectives of successfully resolving the complaint and enhancing the customer relationship in the process.

Course Details

Webinar delivery



Date: 13th November 2024

Time: 9:30am -12:45pm

Price: £50 +VAT

Standard Objectives

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

- Review of current communication styles through specimen complaint letter exercises
- Recognising your audience and their communication styles
- Maintaining an assertive approach in complaint responses when faced with aggressive complainants
- Exercises in using positive language and avoiding nominalisations
- Ensuring that all language used adds value and achieves the underlying objective of conveying all relevant information in an understandable way
- Revisit of earlier complaint responses and rewording these as required.

Workshop Content

- Determine the best means to communicate with a customer in the early stages of a complaint
- Define and use "Plain English" in their complaint resolution communications
- Adopt the approach of writing to "express and not impress" in their e-mails and letters
- Create a personal approach and to achieve rapport with the customer through written communication
- Use positive language



Supporting Vulnerable Customers

All Levels | 3 x CPD Hours

Suitable For:

This workshop aims to equip firms with the knowledge and skills to ensure that support is offered to a vulnerable customer so that they can effectively interact, and firms can deliver on their promised services.

Course Details

Webinar delivery



Date: 14th November 2024

Time: 9:30am -12:45pm

Price: £50 +VAT

Standard Objectives

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

- Understand the FCA's expectations on how firms are expected to serve vulnerable customers and organise themselves to do this consistently.
- Recognise where customers require additional support and respond to those needs accordingly
- To recognise good practice when providing additional support and how to avoid poor practice.
- Review vulnerable customer procedures in your firm to determine if they meet the FCA expectations
- Develop effective processes for recording and addressing vulnerability

Workshop Content

- Recognising a vulnerable customer
 - Poor health
 - Cognitive impairment
 - Caring responsibilities
 - Computer literacy & access
 - Low literacy, numeracy and financial capability skills
- The FCA Report The latest guidance
- Understanding a customer's needs
- Ensure your staff have the right skills and to recognise and respond to the needs of vulnerable customers:
 - Importance of transparency
 - Product & Service Design
 - Accessibility & Suitability
 - How to sensitively record a vulnerability on a customers profile



Understanding Microsoft Excel

Intermediate Level | 3 x CPD Hours

Suitable For:

Suitable for those looking to consolidate existing knowledge and enhance it with technical and useful functions and procedures within the Microsoft Excel platform.

Course Details

Webinar delivery



Date: 15th November 2024

Time: 9:30am -12:45pm

Price: £50 +VAT

Standard Objectives

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

- Refresh and consolidate existing knowledge
- Understand use of IFs, Nested IFs and SUMIF
- Apply Conditional Formatting

Workshop Content

- Existing Knowledge Refresh
- Calculations and Percentages
- Advanced Absolute Referencing
- Conditional Formatting / Sparklines
- The IF Function Using Nested IFs
- The SUMIF function for Analysis and Reconciliation
- VLOOKUP in Detail for Range and Non-Range Lookups
- External Cell Referencing and Linked Documents
- Paste Special
- Questions, Answers and Requests



Policy Wording Interpretations

Suitable for All Levels | 3 x CPD Hours

Suitable For:

This participative webinar will suit anyone who needs a good basic understanding of how general insurance policy wordings operate and how key terms can affect the cover provided. The session will include a number of practical exercises designed to reinforce and embed learning.

Course Details

Webinar delivery



Date: 20th November 2024

Time: 9:30am -12:45pm

Price: £50 +VAT

Standard Objectives

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

- To provide knowledge and understanding of basic policy wordings for general insurance business
- Know how to apply knowledge of principles concerning the operation of policy conditions affecting claims for general insurance business

Workshop Content

- Describe the structure, functions and contents of an insurance contract, including the schedule
- Explain the meaning and use of common policy conditions and exclusions
- Explain the distinction between warranties, conditions, representations and exclusions
- Practical exercises



Professional Indemnity Insurance

Intermediate level | 3 x CPD Hours

Suitable For:

This professional indemnity insurance training workshop is suitable for those with several years' experience of working with Professional Indemnity insurance and looking to learn more.

The workshop is highly interactive and includes a series of exercises and case studies to reinforce the learning.

Course Details

Webinar delivery



Date: 21st November 2024

Time: 9:30am -12:45pm

Price: £50 +VAT

Standard Objectives

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

- Explain how tortuous and contractual liabilities co-exist and how they may differ in their application
- Evaluate the major exposures of different professionals and explain the major differences in coverage offered to them
- Explain recent legal developments impacting on the liability of professionals
- Detail the cover provided by a typical design and build policy
- Detail the underwriting process and explain the principle underwriting considerations
- Examine what processes professionals could use to manage their risk.

Workshop Content

- A recap on the duty of care owed by professionals followed by consideration of some of the standards of care applied
- Employees' personal duty of care
- Comparison of tort and contractual liability how they co-exist, limitation periods etc.
- Risk assessment exercise applicable to accountants, solicitors, surveyors or IT consultants
- Policy wording comparison
- Factors to be considered when underwriting the professional indemnity risk
- Managing the professional indemnity risk.



Director's & Officer's Liability Insurance

Intermediate Level | 3 x CPD Hours

Suitable For:

This interactive D&O insurance training workshop is suitable for those with several years' experience of working with directors and officers liability insurance who are looking to understand more.

Participants will be required to complete some pre-course material ahead of the training session.

Course Details

Webinar delivery



Date: 28th November 2024

Time: 9:30am -12:45pm

Price: £50 +VAT

Standard Objectives

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

- Identify the underwriting considerations for Directors and Officers Liability Insurance
- Explain current developments and trends in the Directors and Officers Liability insurance market
- Outline the coverage under charities, clubs and resident association policies for Directors and Officers Liability insurance and how it differs from a standard Directors and Officers Liability insurance policy
- Outline the benefits of a Pension Trustees Liability policy
- Outline how to handle a Directors and Officers Liability insurance claim
- Identify customers with the greatest need for Directors and Officers Liability insurance
- Outline a strategy for improving customers' awareness of the risks faced by their directors and officers
- Prepare a customer presentation outlining how Directors and Officers Liability insurance would protect them in the context of their overall insurance portfolio.

Workshop Content

- Sources and types of claim against Directors and Officers
- Directors' responsibilities
- Relevant law, including Corporate Manslaughter and UK Company Law reform
- Directors and Officers Liability insurance policy – Detailed review of key benefits
- Directors and Officers Liability insurance
 Detailed proposal and underwriting process
- Factors to consider when assessing the right limit
- Claims process
- Current Directors and Officers liability insurance market – key players
- Recent market changes



The Importance of Effective Presentations

All levels | 3 x CPD Hours

Suitable For:

This workshop is designed for individuals who need to give presentations as part of their role and want to improve their skills. It is suitable for people who are hesitant about presenting, as well as those with some experience who want to enhance their skills.

During the session, participants will have the opportunity to actively develop their new skills by presenting to fellow attendees. Additionally, participants will need to complete some pre-course material before the training session.

Course Details

Webinar delivery



Date: 3rd December 2024

Time: 9:30am -12:45pm

Price: £50 +VAT

Standard Objectives

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

- Identify the tools and techniques that are integral to delivering a confident presentation
- Understand how to structure and plan a presentation based on clearly identified objectives
- Identify how to command audience trust and attention throughout the presentation
- Manage nerves in order to project a calm and confident image
- Deliver a presentation in a lucid and compelling manner
- Handle questions confidently and competently

Workshop Content

- Panic-Free Presentations
 - The ground rules
 - Organisation of material
 - Maintaining audience interest
 - Managing yourself
 - Skills Practice
 - Overcoming fears and worries
 - Positive inner dialogue
 - Managing nerves
 - Structure and delivery
 - Projecting a positive image
- Presentation Skills
 - Using your voice more effectively
 - Focusing your thoughts
 - Using notes and visual aids
 - Managing the audience
- ♦ Skills Practice
 - Building audience rapport
 - Persuasion and influence
 - Communicating the positive
- Rehearsals and practice
- Personal action plan



Managing and Communicating with Hybrid Teams

All levels | 3 x CPD Hours

Suitable For:

This course provides attendees with the knowledge and skills required when managing a hybrid work force. This session will assist attendees in developing a strategy to align their workforce and business objectives and effectively manage and engage remote workers.

Course Details

Webinar delivery



Date: 5th December 2024

Time: 9:30am -12:45pm

Price: £50 +VAT

Standard Objectives

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

- Summarise the key legal requirements to be satisfied when managing home workers
- Know how to encourage employee engagement for remote workers
- Understand how to create flexible work arrangements and policies
- Know how to identify and combat isolation of staff members
- Identify the benefits of home working as part of a hybrid workforce strategy
- Be able to exercise a proportionate degree of oversight and control of home workers

Workshop Content

- The legal environment when the employee's home is also their place of work
- Employer obligations
- Providing the tools and resources for employees to work effectively
- Addressing the isolation and disconnection that can come with remote work
- How managers and team leaders can encourage employee engagement
- ♦ The use of technology pro's and con's



Cyber Crime Awareness

All levels | 3 x CPD Hours

Suitable For:

Cyber crime is increasing. This interactive workshop provides an ideal introduction for all technology users; to help raise awareness of malicious activity, Internet fraud and technology scams. Regular quizzes throughout this session aid in reaffirming the content for delegates.

Course Details

Webinar delivery

Date: 6th December

2024

Time: 9:30am -12:45pm

Price: £50 +VAT

Standard Objectives

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

- Understand the various cyber risks organisations face
- Understand the extent of cover provided by different types of cyber risk policies
- Understand the BI section of a cyber risk policy including loss measurement
- Know what a fair presentation of a cyber risk needs to include and why
- Understand the main issues around dealing with cyber claims

Workshop Content

- Understand the Impact of Cyber Crime on Business
- Recognise the Dangers of Unsolicited Emails
- Learn How to Reduce Risks

Click here to book your place

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Liability Insurance

Intermediate level | 3 x CPD Hours

Suitable For:

Suitable for the more experienced delegate involved in either underwriting, claims or broking.

This session aims to enhance participants knowledge of principles and practice of liability insurance with particular focus on employers' liability. There is a strong emphasis on recent health and safety legislation and how it has impacted on employers' liability risks.

Course Details

Webinar delivery



Date: 10th December 2024

Time: 9:30am -12:45pm

Price: £50 +VAT

Standard Objectives

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

- Assess liability exposures and make recommendations for relevant employers' liability insurance coverage and policy limits for different types of customer
- Explain the cover usually provided under employers' liability insurance policies
- Explain the difference between employers' liability and workers' compensation covers
- Outline the key requirements of recent health and safety legislation
- Explain the main considerations which impact on the underwriting and pricing of employers' liability insurance risks
- Outline the key issues currently affecting the employers' liability insurance market with regard to the cost of claims

Workshop Content

- How liability arises both under common law and statute
- Review of legislation for employers' liability and health and safety at work – compulsory insurance legislation, Health & Safety at Work Act, specific risk regulations including COSHH, noise, RSI, stress, asbestos
- Policy cover and exclusions
- Main underwriting features impacting on employers' liability insurance risk assessment and pricing
- How to set liability limits
- Introduction to risk management and its relevance to employers' liability insurance
- Claims handling processes, reserving and recent legal and social trends (Woolf reforms, RIDDOR, rehabilitation, industrial disease funding)



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