



Chartered  
Insurance  
Institute

Standards. Professionalism. Trust.

# Customer Focus (Insurance)

Learning  
resources  
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# Contents

About Customer Focus .....	3
Learning by bands .....	4
Member CPD .....	9
Assess corporate e-learning .....	10
Training and courses .....	11
Qualification units .....	12

# About Customer Focus

Recognises customers' needs, meets their requirements and adds value to customer outcomes, balances customer and business demands and demonstrates commercial awareness.

This section outlines the Customer Focus competency standards for each of the four professional bands, together with links to relevant CPD learning, qualification units and other learning to help you prioritise and access your skills development.

## The bands

The Professional Map is structured into 4 bands of experience, each describing the different level of impact professionals have in the work they do.

	Band 1	Band 2	Band 3	Band 4
<b>Typical job roles</b>	Front line staff, administrative and entry level roles	First line managers, team leaders, regulated and specialist roles	Middle managers, and senior technical roles	Senior leaders and business owners
<b>Nature of work</b>	Tactical, focusing on the day to day	Operational, with some complexity	Complex, with challenging requirements	Strategic, with a significant level of complexity and challenge
<b>Sphere of influence</b>	Line manager, immediate colleagues and customers/clients	Managers, colleagues, customers/clients and external professionals	Wider range of stakeholders, both internal and external	Senior stakeholders from across the profession, customers, suppliers and regulators
<b>Focus of activity</b>	Deliver immediate and short-term outcomes	Directly create short-term value, contribute to longer-term value	Create medium to long-term value	Create long-term value
<b>Focus of thinking</b>	Gather and use information	Contribute to the thinking and analysis of information	Critically question information and evaluate it to make informed judgements and decisions	Develop evidence-based thinking, using qualitative and quantitative data to shape the future activity
<b>Focus of knowledge</b>	Knowledge of the principles of insurance	Broad understanding of insurance practice	Deeper understanding of the concepts of insurance, with specialism in a functional area	Deep technical knowledge in an area, or an excellent understanding of the broader environment
<b>Where time is spent</b>	Customer/client services, providing information, handling data, following procedures	Issue identification, analysis and evaluation, proposal and delivery of solutions to agreed standards, and within agreed limits	Understanding the wider business context and risk, bringing strands of activity together, innovating	Developing strategies and plans, making complex judgements, considering the organisation and sector position
<b>Breadth of focus</b>	Team	Department	Area or responsibility/Organisation	Organisation/Profession/Wider society

# Band 1

## Competency standards

- I take measures to understand what the customer requires and ensure that I consistently meet their demands and needs
- I treat all customers fairly and take particular care when dealing with those in vulnerable circumstances
- I understand there may be a conflict between customer and business needs
- I know the business drivers for my organisation
- I understand who does what in my organisation, who my key stakeholders are and how this impacts on my responsibilities

## Band 1 learning resources

Member CPD	Assess corporate e-learning	Training and courses	Qualification units
<a href="#">Code of Ethics: Focus on financially inclusive customer outcomes</a> <a href="#">Slips and Trips</a> <a href="#">The Hazard of Renewal</a>	<a href="#">Conduct Risk and TCF</a> <a href="#">Managing conflicts of interest</a>	<a href="#">EDII – Digital Minds</a> For more details on CII Training, please visit our website: <a href="http://www.cii.co.uk/learning/training/">www.cii.co.uk/learning/training/</a>	<a href="#">Customer service in insurance IF9</a>

## Band 2

### Competency standards

- I anticipate customers' future demands and needs and initiate appropriate action
- I proactively seek to understand the needs and issues of customers and ensure I am serving their wider best interests
- I lead by example through identifying opportunities to add value to customer outcomes
- I make decisions that balance the customer and business requirements
- I stay up to date with changes in my organisation and the market

### Band 2 learning resources

Member CPD	Assess corporate e-learning	Training and courses	Qualification units
<a href="#">Bermuda Form and key issues to the Bermuda market</a>	<a href="#">Demands and needs</a>	<a href="#">EDII – Digital Minds</a>	<a href="#">Customer service in insurance IF9</a>
<a href="#">Consumer duty</a>	<a href="#">Workplace skills</a>	For more details on CII Training, please visit our website: <a href="http://www.cii.co.uk/learning/training/">www.cii.co.uk/learning/training/</a>	<a href="#">Marketing insurance products and services 945</a>
<a href="#">Fair, reasonable and informed – Making sound decisions</a>			
<a href="#">Insurance: How to read policy wordings</a>			
<a href="#">Seven reasons why there will be a hard market</a>			
<a href="#">Underinsurance – the implications for Insurance Brokers</a>			

## Band 3

### Competency standards

- I use customer feedback to inform business plans and priorities
- I use feedback to strive for fair customer outcomes and anticipate circumstances from which vulnerabilities may arise
- I encourage others to use their initiative to achieve better customer outcomes
- I take decisions that account for longer term customer and business requirements
- I invest time in staying up to date with market trends, customer demands and competitor activity

### Band 3 learning resources

Member CPD	Assess corporate e-learning	Training and courses	Qualification units
<a href="#">The monopoly of markets - a game of chance or strategy?</a>	<a href="#">Workplace skills</a>	<a href="#">Dive In Festival</a>	<a href="#">Customer service in insurance IF9</a>
<a href="#">Why is everyone talking about Chat GPT?</a>		<a href="#">EDII – Digital Minds</a>	<a href="#">Insurance corporate management 990</a>
		For more details on CII Training, please visit our website: <a href="http://www.cii.co.uk/learning/training/">www.cii.co.uk/learning/training/</a>	

## Band 4

### Competency standards

- I create strategies and systems that reinforce the importance of providing an excellent customer experience
- I inspire and champion a culture focused on good customer outcomes
- I ensure that the customer is at the heart of decision making and business planning
- I demonstrate broad business thinking and sound commercial judgement in generating ideas
- I produce robust strategies to develop sustainable customer propositions

### Band 4 learning resource

Member CPD	Assess corporate e-learning	Training and courses	Qualification units
<a href="#">Pricing Progress</a>		<a href="#">Dive In Festival</a>	<a href="#">Insurance corporate management 990</a>
<a href="#">Putting the ethics into ESG</a>		<a href="#">EDII – Digital Minds</a>	<a href="#">Strategic claims management 996</a>
		For more details on CII Training, please visit our website: <a href="http://www.cii.co.uk/learning/training/">www.cii.co.uk/learning/training/</a>	



# Member CPD

Here you will find links to Member CPD available related to this competency.

Webinar: [Code of Ethics: Focus on financially inclusive customer outcomes](#)

Webinar: [Fair, reasonable and informed – Making sound decisions](#)

Webinar: [Seven reasons why there will be a hard market](#)

Article: [Consumer duty](#)

Article: [Pricing Progress](#)

Article: [Putting the ethics into ESG](#)

Webinar: [The Hazard of Renewal](#)

Webinar: [Underinsurance – the implications for Insurance Brokers](#)

Webinar: [Insurance: How to read policy wordings](#)

Webinar: [Why is everyone talking about Chat GPT?](#)

Webinar: [Bermuda Form and key issues to the Bermuda market](#)

Webinar: [Slips and Trips](#)

Assess is the Corporate Learning Management System from CII, including hundreds of digital learning units on technical insurance, regulatory and compliance content, together with a wide range of wider business skills.

If you already have an Assess licence through your employer, you should be able to access the following modules relevant to this competency.

If your organisation does not have an Assess licence and would be interested in acquiring one, you can sign up for a free trial here: [ciigroup.wufoo.com/forms/k17wqe99089pcpi/](https://ciigroup.wufoo.com/forms/k17wqe99089pcpi/)

Here you will find Assess corporate e-learning listed under the Learning by bands section in one place.

## Foundations of General Insurance

### *Broker Operations*

Demands and needs

## Governance, Risk and Compliance

### *Conduct*

Conduct Risk and Treating Customers Fairly

Managing Conflicts of Interest

## Workplace Skills

Workplace skills

# Training and courses

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.

## **CII Training**

For more details on CII Training, please visit our website:

[www.cii.co.uk/learning/training/](http://www.cii.co.uk/learning/training/)

## **CII Accredited third party training**

[Dive In Festival](#)

[EDII – Digital Minds](#)

Here you will find all Qualification units listed under the Learning by bands section in one place.

If you are a current member you can also view non-printable PDFs of each study text here:

[www.cii.co.uk/learning/support/cii-study-texts](https://www.cii.co.uk/learning/support/cii-study-texts) (PIN required to login).

## Advanced Diploma in Insurance

Marketing insurance products and services (945): <https://www.cii.co.uk/learning/qualifications/unit-945/>

Insurance corporate management (990): <https://www.cii.co.uk/learning/qualifications/unit-990/>

Strategic claims management (996): <https://www.cii.co.uk/learning/qualifications/unit-996/>

## Certificate in Insurance

Customer service in insurance (IF9): <https://www.cii.co.uk/learning/qualifications/unit-if9/>