



Chartered
Insurance
Institute

Standards. Professionalism. Trust.

Inclusivity (Personal Finance)

Learning
resources
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About Inclusivity

Builds positive working relationships, networks effectively, listens to and respects the views and opinions of others, supports those around them, works across boundaries, recognises and appreciates diversity.

This section outlines the Inclusivity 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
Typical job roles	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
Nature of work	Tactical, focusing on the day to day	Operational, with some complexity	Complex, with challenging requirements	Strategic, with a significant level of complexity and challenge
Sphere of influence	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
Focus of activity	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
Focus of thinking	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
Focus of knowledge	Knowledge of the principles of personal finance	Broad understanding of personal finance practice	Deeper understanding of the concepts of personal finance, with specialism in a functional area	Deep technical knowledge in an area, or an excellent understanding of the broader environment
Where time is spent	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
Breadth of focus	Team	Department	Area or responsibility/Organisation	Organisation/Profession/Wider society

Band 1

Competency standards

- I proactively develop relationships with colleagues and customers
- I act in a friendly and supportive manner responding appropriately and willingly to requests for help
- I listen to other people with respect, recognising that they may have a different perspective and aware of my own biases
- I share relevant information with colleagues and customers and keep them up to date
- I consider the needs and feelings of others in order to gain a wider perspective

Band 1 learning resources

Member CPD	Assess corporate e-learning	Training and courses	Qualification units
How to build the perfect support team in 2023	Workplace skills	For more details on CII Training, please visit our website: www.cii.co.uk/learning/training/	Supervision in a regulated environment J07
Trans* ally guidance			Senior management and supervision AF6
Working with vulnerable clients			

Band 2

Competency standards

- I build positive, constructive relationships within the business and with external stakeholders
- I anticipate when others need support and collaborate with colleagues to achieve tasks
- I actively listen to others in order to address their views and concerns
- I proactively share knowledge with other teams and other functions
- I respect and draw upon the strengths of different individuals

Band 2 learning resources

Member CPD	Assess corporate e-learning	Training and courses	Qualification units
<u>Niche, if you want to talk to everyone, you talk to no one</u>	<u>Workplace skills</u>	For more details on CII Training, please visit our website: <u>www.cii.co.uk/learning/training/</u>	<u>Supervision in a regulated environment J07</u> <u>Senior management and supervision AF6</u>

Band 3

Competency standards

- I network with others in my field and beyond, both internally and externally
- I consistently share knowledge and insights that are useful to my internal and external stakeholders including *pro bono* and contribution to the wider profession
- I proactively build diverse teams in order to increase effectiveness
- I instigate collaborative development activities to improve relationships and organisational performance
- I encourage others to embrace an inclusive culture

Band 3 learning resources

Member CPD	Assess corporate e-learning	Training and courses	Qualification units
How To Build Your Perfect Support Team	Workplace skills	Dive In Festival	Supervision in a regulated environment J07
Unmute your potential: the power of professional connections		EDII – Digital Minds	Senior management and supervision AF6
Women's career progression in the UK financial planning sector		For more details on CII Training, please visit our website: www.cii.co.uk/learning/training/	

Band 4

Competency standards

- I proactively seek opportunities to develop relationships throughout the profession
- I collaborate cross functionally to tackle broader and longer term strategic matters
- I develop and role-model an inclusive culture both throughout the organisation and the profession
- I develop an organisation wide communication strategy to cascade objectives both internally and externally
- I instigate processes to increase equality, diversity and inclusion & ensure that the organisation leverages its diversity effectively

Band 4 learning resources

Member CPD	Assess corporate e-learning	Training and courses	Qualification units
Equality, D&I - how insurers can improve access to careers and services		Dive In Festival EDII – Digital Minds For more details on CII Training, please visit our website: www.cii.co.uk/learning/training/	Supervision in a regulated environment J07 Senior management and supervision AF6

Member CPD

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

Webinar: [Working with vulnerable clients](#)

Article: [Trans* ally guidance](#)

Webinar: [Unmute your potential: the power of professional connections](#)

Webinar: [How To Build Your Perfect Support Team](#)

Report: [Women's career progression in the UK financial planning sector](#)

Webinar: [Equality, D&I - how insurers can improve access to careers and services](#)

MicroLearn: [Unconscious bias](#)

Hot tip: [10 DOs and DON'Ts for surviving a new boss](#)

Hot tip: [3 generations in the workplace](#)

Hot tip: [8 ways to handle an angry boss](#)

Article: [Are you supporting a language barrier?](#)

Hot tip: [Are you the type that drives your manager crazy?](#)

Article: [Building effective relationships](#)

Article: [Conflict & the 3 roles of the Drama Triangle](#)

MicroLearn: [Dealing with conflict](#)

Article: [Dealing with difficult colleagues](#)

Article: [Dealing with passive-aggression](#)

Article: [Do your emails wind people up?](#)

MicroLearn: [Empathy](#)

MicroLearn: [Great conversations](#)

Article: [Healthy conflict & how to handle it](#)

Webinar: [How to build the perfect support team in 2023](#)

Article: [How to spot and cure a micromanager](#)

Coach video: [How to strengthen your working relationships](#)

Hot tip: [Making office politics work for you](#)

Coach video: [Managing upwards](#)

Webinar: [Niche, if you want to talk to everyone, you talk to no one](#)

Coach video: [Recognising the impact of your non verbal communication](#)

MicroLearn: [Relationship building](#)

Article: [Socialising: an essential job requirement](#)

Hot tip: [The DOs and DON'Ts of coworker socialising](#)

Hot tip: [The DOs and DONTs of texting your boss](#)

Article: [The importance of assertiveness](#)

Coach video: [The importance of managing working relationships](#)

Article: [Unconscious bias at work](#)

Hot tip: [What are teamworking skills?](#)

Article: [Why your emails should be 5 sentences long](#)

Course: [Workplace etiquette](#)

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/

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

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/

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 (PIN required to login).

Advanced Diploma in Financial Planning

Senior management and supervision (AF6): <https://www.cii.co.uk/learning/qualifications/unit-af6/>

Diploma in Financial Planning

Supervision in a regulated environment (J07): <https://www.cii.co.uk/learning/qualifications/unit-j07>