



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 | | | |

*Content held on the Assess platform is available to those with a corporate licence. Click on the links to find out more about the features and benefits of a corporate Assess licence or request a free trial.

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 |
|--|----------------------------------|--|---|
| Niche, if you want to talk to everyone, you talk to no one | Workplace skills | 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 |

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

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

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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](#)

Report: [Achieving an inclusive working environment for disabled people](#)

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

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

Webinar: [Mental Health in Business](#)

Good practice guide: [Manager Guidance: Supporting employees with Autism Spectrum Disorders](#)

Webinar: [Mental health in the workplace](#)

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://shop.ciigroup.org/senior-management-and-supervision-af6-af6.html>

Diploma in Financial Planning

Supervision in a regulated environment (J07): <https://shop.ciigroup.org/supervision-in-a-regulated-environment-j07--j07>