



Chartered
Insurance
Institute

Standards. Professionalism. Trust.

Drive to Deliver (Personal Finance)

Learning
resources
v1.4
October 2023

Contents

About Drive to Deliver	3
Learning by bands	4
Member CPD	9
Assess corporate e-learning	16
Training and courses	17
Qualification units	18

About Drive to Deliver

Takes accountability for their work, organises and prioritises, delivers results, is action oriented, sets and achieves goals and demonstrates resilience.

This section outlines the Drive to Deliver 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 know how my role contributes to the department and I complete my given objectives
- I take action to make things happen
- I deliver what is asked of me on time and to the required standard
- I manage my time through planning and prioritising my workload, taking importance and urgency into account
- I respond positively to challenge and accept and act upon feedback

Band 1 learning resources

Member CPD	Assess corporate e-learning*	Training and courses	Qualification units
Schedule, commit, complete	Workplace skills	For more details on CII Training, please visit our website: www.cii.co.uk/learning/training/	
Time and how to use it for maximum effect			

*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 know how my role contributes to the organisation and I complete my objectives
- I maintain momentum demonstrating perseverance and tenacity in my work
- I consistently achieve high quality results on time and to budget
- I am agile and effectively manage competing demands on my time
- I am resilient and recover quickly from setbacks

Band 2 learning resources

Member CPD	Assess corporate e-learning*	Training and courses	Qualification units
Professional Focus: How to succeed without your inner critic	Workplace skills	For more details on CII Training, please visit our website: www.cii.co.uk/learning/training/	Supervision in a regulated environment (J07)

*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 3

Competency standards

- I work towards the organisation's goals by setting aligned objectives and stretching targets for myself
- I introduce new and enhanced processes to help manage the completion of tasks
- I reschedule priorities and timescales in light of changing requirements
- I encourage those around me to adapt and respond to quickly changing demands
- I remain composed in the light of adversity

Band 3 learning resources

Member CPD	Assess corporate e-learning*	Training and courses	Qualification units
Engineering Robust Systems to Deliver Exceptional Client Service	Workplace skills	Dive In Festival	Supervision in a regulated environment (J07)
Growing your financial planning business in uncertain times		EDII – Digital Minds	
How to get a million in revenue		For more details on CII Training, please visit our website: www.cii.co.uk/learning/training/	
Managing teams remotely			
Schedule, commit, complete			

*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 4

Competency standards

- I set the strategy and targets to allow people to focus their efforts on achieving the organisational goals
- I develop and implement plans for the business in order to achieve departmental or organisational strategy
- I assess and review the planning process on completion of projects to enhance future planning
- I ensure my organisation is able to adapt and respond to quickly changing demands
- I identify and adopt best practices from other organisations and the wider profession
- I remain composed in the light of adversity

Band 4 learning resources

Member CPD	Assess corporate e-learning*	Training and courses	Qualification units
Attract clients who are fulfilling, fascinating and fun	Workplace skills	Dive In Festival	
A succession story, the highs, the low and the lessons		EDII – Digital Minds	
How to build a business to last beyond you		For more details on CII Training, please visit our website: www.cii.co.uk/learning/training/	
How to get from £1m to £2m in revenue			
Leading through uncertainty and change			
Pricing your services			
The Business of Financial Planning			
Three things you can't avoid as a business owner			

*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.

Member CPD

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

Webinar: [Schedule, commit, complete](#)

Webinar: [Time and how to use it for maximum effect](#)

Webinar: [Professional Focus: How to succeed without your inner critic](#)

Video: [Dealing with stress](#)

Webinar: [Engineering Robust Systems to Deliver Exceptional Client Service](#)

Webinar: [Growing your financial planning business in uncertain times](#)

Webinar: [How to build a business to last beyond you](#)

Webinar: [How to get a million in revenue](#)

Webinar: [Leading through uncertainty and change](#)

Webinar: [Future proofing your CIP - sharing the findings of a major new research study among advisers](#)

Webinar: [Managing teams remotely](#)

Webinar: [Professional Focus: How to succeed without your inner critic](#)

Webinar: [Three things you can't avoid as a business owner](#)

Webinar: [The Business of Financial Planning](#)

Webinar: [How to get from £1m to £2m in revenue](#)

Coach video: [10 ways to prevent procrastination at home](#)

Article: [3 reasons to find your morning mantra](#)

Hot tip: [3 tips to deal with missing a deadline](#)

Hot tip: [4 tips to demonstrate emotional intelligence at an interview](#)

Article: [4 tips to successfully manage paternity leave](#)

Hot tip: [5 steps to be an intrapreneur](#)

Hot tip: [5 steps to crafting a memorable story](#)

Hot tip: [5 steps to reducing your stress levels](#)

Hot tip: [5 steps to stop procrastinating](#)

Hot tip: [5 time management tips for leaders](#)

Article: [5 tips to improve your work-life balance](#)

Article: [5 ways to make your lunch break work for you](#)

Article: [6 quick tips to develop your resourcefulness](#)

Hot tip: [6 steps to halt a burnout](#)

Hot tip: [6 steps to improve your business writing](#)

Hot tip: [6 steps to improve your problem-solving](#)

Hot tip: [6 tips to achieve your goals](#)

Hot tip: [6 tips to be a remarkable leader](#)

Hot tip: [6 tips to build resilience](#)

Article: [6 tips to improve your work-life balance when working from home](#)

Hot tip: [7 steps to create your career marketing plan](#)

Hot tip: [7 things successful people always do](#)

Article: [7 things you can do at work with a spare hour](#)

Article: [7 tips for working effectively from home](#)

Hot tip: [7 tips to boost your productivity](#)

Hot tip: [7 tips to say no without ruining your reputation](#)

Hot tip: [8 ways to get perspective on your list](#)

Coach video: [10 ways to prevent procrastination at home](#)

Coach video: [A model for emotional intelligence](#)

Webinar: [A succession story, the highs, the low and the lessons](#)

MicroLearn: [Ambiguity](#)

Article: [Are emails your first priority in the morning?](#)

Article: [Are you addicted to interruptions?](#)

Article: [Are you an emotionally intelligent boss?](#)

Course: [Asking for help when feeling the pressure](#)

Webinar: [Attract clients who are fulfilling, fascinating and fun](#)

Article: [Become a more creative problem-solver](#)

Article: [Become a more creative you with pulsing](#)

MicroLearn: [Becoming more confident at work](#)

Course: [Being productive when working from home](#)

Course: [Being your true self at work](#)

Course: [Being your true self at work \(Aus\)](#)

Course: [Boost your productivity](#)

Article: [Building Confidence](#)

Article: [Bullying in the workplace](#)

Career advice video: [Can you learn to be persistent?](#)

MicroLearn: [Collaborative working](#)

Coach video: [Communicating effectively as a leader](#)

Article: [Coping with open plan offices](#)

Article: [Coping with stress](#)

Coach video: [Coping with stress and pressure](#)

Course: [Coping with the pressure of work](#)

MicroLearn: [Coronavirus awareness](#)

Podcast: [Creating a career marketing plan](#)

Coach video: [Creating a positive cultural shift](#)

Article: [Creating the space to be a better leader](#)

Hot tip: [Dealing with negative feedback](#)

MicroLearn: [Dealing with stress](#)

Article: [Developing a career plan](#)

MicroLearn: [Developing leadership](#)

Coach video: [Developing your EI - part 1 attitudes and feelings](#)

Coach video: [Developing your EI - part 2 behaviours & relationships](#)

Podcast: [Developing your mental toughness](#)

Coach video: [Developing your resilience](#)

Article: [Developing your skills](#)

Article: [Does the 8-hour work day work for you?](#)

Article: [E.I. for better relationships and productivity](#)

Coach video: [Eastern philosophies in a western workplace](#)

Coach video: [Emotional intelligence for early careers](#)

Coach video: [Emotional intelligence for students & graduates](#)

Podcast: [Emotional intelligence & leadership](#)

Coach video: [Emotional intelligence & the link to resilience](#)

Coach video: [Employee engagement](#)

Article: [Ensure your commute is not a waste of time](#)

MicroLearn: [Everyday energy](#)

Career advice video: [Facing an impossible challenge](#)

Article: [Feeling unproductive? Time for a change of scenery](#)

Coach video: [First pillar of optimum performance: Nutrition](#)

Article: [Five steps for dealing with change at work](#)

Hot tip: [Flexible working terminology](#)

Coach video: [Fourth pillar of optimum performance: Environment](#)

Coach video: [From uni to work: how to be more productive](#)

Article: [Going back...to a new role after a long break](#)

Article: [Have you got a positive attitude?](#)

MicroLearn: [Healthy living](#)

Article: [How exercise can impact your performance at work](#)

Coach video: [How good is your work-life balance?](#)

Coach video: [How I managed my career](#)

Coach video: [How to approach your boss about work-life balance](#)

Hot tip: [How to be more commercially aware](#)

Article: [How to connect better as a leader](#)

Coach video: [How to cope with change and challenges](#)

Career advice video: [How to cope with setbacks](#)

Article: [How to develop your cognitive flexibility](#)

Article: [How to 'do' feedback as a leader](#)

Article: [How to get ahead in a 'flat' organisation](#)

Article: [How to improve your resilience](#)

Hot tip: [How to leave work on time](#)

Article: [How to make waking up easier](#)

Article: [How to manage your emotions in the workplace](#)

Coach video: [How to say no comfortably](#)

Coach video: [How to set objectives](#)

Article: [How to set realistic career goals](#)

Coach video: [How to survive and thrive in our changing world](#)

Article: [How yoga can boost career well-being & performance](#)

Article: [I didn't have time...](#)

Article: [If you want to be resilient, be more optimistic](#)

Coach video: [In the changing world of work what questions do you need to ask yourself](#)

Article: [Is home just the place you don't work?](#)

Article: [Is perfectionism holding you back?](#)

Coach video: [Juggling work, life and children: 2 tips](#)

Coach video: [Juggling work, life and children: 4 tips](#)

Article: [Laughter is the best medicine](#)

Coach video: [Leaders vs. managers](#)

Fastclass: [Leadership styles](#)

Coach video: [Lessons from champions: engaging the team](#)

Coach video: [Lessons from champions: inner voice](#)

Coach video: [Lessons from champions: planning](#)

MicroLearn: [Letting Go](#)

MicroLearn: [Life balance](#)

Article: [Listening – the Cinderella of communication skills](#)

MicroLearn: [Managing emotions](#)

MicroLearn: [Managing personal finance](#)

Article: [Minimise decisions to be a better decision-maker](#)

Coach video: [My 10 top career tips](#)

Coach video: [Myths & realities of adult ADHD](#)

Coach video: [Negotiating your return to work](#)

Coach video: [Overcoming the challenges women face at work](#)

Coach video: [Overcoming the imposter syndrome](#)

Article: [Parenting skills that make you a better manager](#)

MicroLearn: [Personal agility](#)

Coach video: [Personal leadership skills for your career](#)

Coach video: [Plan and achieve your career journey](#)

MicroLearn: [Planning your own development](#)

Coach video: [Prioritisation and your to-do list](#)

Article: [Productive things to do on a slow day](#)

Explainer video: [Productivity explained](#)

Article: [Progressing your career with E.I.](#)

Article: [Psychopaths, Narcissists, Machiavellians & leaders](#)

Hot tip: [Qualities of people with a high EQ](#)

Coach video: [Receiving and acting on feedback positively](#)

MicroLearn: [Relaxation](#)

MicroLearn: [Remote working](#)

Explainer video: [Resilience explained](#)

Coach video: [Resilience for leaders](#)

Coach video: [Resilience is a key career skill](#)

Course: [Returning to work after furlough](#)

Hot tip: [Returning to work after long term illness](#)

Coach video: [Returning to work after maternity](#)

Coach video: [Second pillar of optimum performance: Sleep](#)

Article: [Setting goals effectively](#)

MicroLearn: [Setting objectives](#)

Podcast: [Setting S.M.A.R.T. goals](#)

Article: [So you have 12,862 emails in your inbox...](#)

Article: [Space, posture and productivity](#)

Coach video: [Starting your career with resilience](#)

Article: [Storytelling for your career](#)

Article: [Stress can be good for you](#)

Coach video: [The 3 top time stealers & how to manage them](#)

MicroLearn: [The benefits of mindfulness](#)

Article: [The benefits of teasing your brain regularly](#)

Coach video: [The business case for emotional intelligence](#)

Article: [The challenge of having to make the right decision](#)

Coach video: [The difference between efficiency & effectiveness](#)

MicroLearn: [The effective leader](#)

Article: [The five different types of imposter syndrome](#)

Article: [The importance of being emotionally intelligent](#)

Article: [The importance of conscious competence](#)

Coach video: [The neuropsychology of change](#)

Article: [The positive side to procrastination](#)

Article: [The power of positive thinking](#)

Coach video: [The Resilience EDGE model](#)

Animated video: [The rocky road to accepting change](#)

Coach video: [The single science of optimum performance](#)

Article: [The skills employers look for](#)

Article: [The skills you need to thrive in a changing world](#)

Course: [The tools you need for remote working success](#)

Coach video: [The traits of ADHD at work](#)

Article: [The value of storytelling](#)

Coach video: [Third pillar of optimum performance: Exercise](#)

Hot tip: [Time to embrace your mistakes](#)

Article: [Tips for staying energised](#)

Coach video: [Tips & techniques for managing ADHD](#)

Hot tip: [To ask or not to ask for help](#)

Article: [Understanding fear of change and overcoming it](#)

Article: [What are self-management skills?](#)

Article: [What can we learn from women leaders?](#)

Hot tip: [What does your desk say about you?](#)

Coach video: [What is emotional intelligence?](#)

Article: [What is ethical decision making?](#)

Podcast: [What is mental toughness?](#)

Article: [What is mindfulness?](#)

Coach video: [What is resilience?](#)

Article: [What is your emotional intelligence level?](#)

Article: [What successful people do before breakfast](#)

Article: [What type of leader are you?](#)

Animated video: [What's your ultradian rhythm?](#)

Coach video: [Why do you procrastinate when you work from home](#)

Article: [Why sleeping on the job can be a very good thing](#)

Article: [Why too much sleep can be bad for you](#)

Article: [Why you need research skills](#)

MicroLearn: [Winter well-being](#)

MicroLearn: [Workplace bullying](#)

Coach video: [3 types of stories you need to be able to tell](#)

Hot tip: [4 steps to find the cause of problems](#)

Hot tip: [4 techniques to brainstorm](#)

Hot tip: [4 tips to gain respect in a meeting](#)

Hot tip: [5 steps to improve your intercultural skills](#)

Hot tip: [5 tips to calm your nerves](#)

Hot tip: [6 digital skills you can teach yourself](#)

Hot tip: [6 tips to close a presentation](#)

Article: [A beginner's guide to using Google Meet](#)

Article: [A beginner's guide to using Zoom](#)

Course: [Adaptability & flexibility](#)

Article: [Add a dose of empathy to your emails](#)

Animated video: [Analytical skills analysed](#)

Article: [Becoming a good listener](#)

Career advice video: [Choosing a topic for interview presentations](#)

Course: [Communication & interpersonal skills](#)

Article: [Creating a great presentation](#)

Course: [Critical thinking & problem-solving](#)

Fastclass: [Effective Participation in Meetings](#)

Course: [Essentials of Negotiation](#)

Coach video: [How and why we use stories in work and life](#)

Article: [How to avoid sticky sentences](#)

Article: [How to check your own work](#)

Career advice video: [How to cope with presentation nerves](#)

Course: [How to run an online meeting](#)

Coach video: [How to structure a story](#)

Course: [IT skills & digital literacy](#)

Course: [Leverage in negotiation](#)

Course: [Negotiation and the other party's interests](#)

Course: [Negotiation goals](#)

Course: [Negotiation styles](#)

Article: [Online meeting etiquette](#)

Course: [Opening negotiation](#)

Course: [Planning & organising skills](#)

Article: [Practical preparation for a 'big' presentation](#)

Career advice video: [Public speaking tips](#)

Course: [Relationships in negotiation](#)

Course: [Self-management & initiative](#)

Hot tip: [Setting a meeting agenda](#)

Career advice video: [Should you use PowerPoint in your presentations?](#)

Course: [Standards in negotiation](#)

Course: [Teamworking & collaboration](#)

Article: [The 'empty-calorie' waffle](#)

Hot tip: [The 60 second email checklist](#)

Article: [The basics of taking meeting minutes](#)

Hot tip: [The impact of your voice](#)

Course: [The negotiation process](#)

Hot tip: [The top 7 sales skills](#)

Article: [The ultimate workplace skills](#)

Article: [Top tips for presenting online](#)

Article: [What are intercultural skills?](#)

Hot tip: [When not to negotiate](#)

Fastclass: [Writing a professional email](#)

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).

Diploma in Financial Planning

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