



Chartered
Insurance
Institute

Standards. Professionalism. Trust.

Impact (Personal Finance)

Learning
resources
v1.5
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About Impact

Communicates with others in a clear, concise and purposeful way, adapts their communication style to suit the audience, creates a positive impact, uses logical argument to influence, is credible and has a good reputation.

This section outlines the Impact 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 present myself and my ideas in a professional manner
- I communicate clearly so that my messages are understood by others
- I provide self-assured responses in a credible manner
- I influence others through the use of logical argument
- I demonstrate my credibility within the organisation by creating a positive impression

Band 1 learning resources

Member CPD	Assess corporate e-learning	Training and courses	Qualification units
How to succeed without your inner critic - Part 1 of 2	Workplace skills	EDII – Digital Minds	
How to succeed without your inner critic - Part 2 of 2		For more details on CII Training, please visit our website: www.cii.co.uk/learning/training/	
The key ingredients to a successful pitch			

Band 2

Competency standards

- I adapt my communication style depending on the needs and objectives of the audience
- I present my ideas and information in a way that positively influences outcomes
- I contribute to discussions and activities in an informed and confident way
- I argue constructively in order to persuade
- I am prepared to take on new and challenging work

Band 2 learning resources

Member CPD	Assess corporate e-learning	Training and courses	Qualification units
The Client Conversion Problem	Workplace skills	EDII – Digital Minds	
From Prospect to Promoter		For more details on CII Training, please visit our website: www.cii.co.uk/learning/training/	

Band 3

Competency standards

- I am credible and confident in situations where strong opposition or potential conflict exists
- I enthuse, motivate and generate commitment from others through my style of communication
- I develop confidence and influence across my team
- I negotiate and achieve win-win solutions
- I am known externally and internally as being an authority on my subject

Band 3 learning resources

Member CPD	Assess corporate e-learning	Training and courses	Qualification units
Confident, constructive and challenging conversations	Workplace skills	Dive In Festival	
How to handle challenging conversations with clients		EDII – Digital Minds	
How to politely disengage clients		For more details on CII Training, please visit our website: www.cii.co.uk/learning/training/	
How to write well or better			
The Effective Manager – Connection			
The Effective Manager – Observation			
The Power of a Personal Brand: How to Differentiate Yourself from the Competition			

Band 4

Competency standards

- I build a culture that encourages open communication and information sharing at all levels
- I build confidence in and gain acceptance of ideas and strategies by relating them to stakeholders' needs and goals
- I create a culture where sustainable long term agreements are developed despite competing objectives
- I actively influence the external environment by spotting opportunities within and beyond my organisation
- I actively reinforce and further a good reputation within the profession

Band 4 learning resources

Member CPD	Assess corporate e-learning	Training and courses	Qualification units
How to Grow Your Brand on Social Media		Dive In Festival	Insurance corporate management
POWER Talks to Practitioners – How to Grow Your Brand		EDII – Digital Minds	CII Code of Ethics
		For more details on CII Training, please visit our website: www.cii.co.uk/learning/training/	

Member CPD

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

Webinar: [From Prospect to Promoter](#)

Webinar: [How to Grow Your Brand on Social Media](#)

Webinar: [How to succeed without your inner critic - Part 1 of 2](#)

Webinar: [How to succeed without your inner critic - Part 2 of 2](#)

Webinar: [POWER Talks to Practitioners – How to Grow Your Brand](#)

Webinar: [The Power of a Personal Brand: How to Differentiate Yourself from the Competition](#)

Webinar: [The Client Conversion Problem](#)

Webinar: [The Effective Manager – Connection](#)

Webinar: [The Effective Manager – Observation](#)

Webinar: [How to write well or better](#)

Webinar: [Confident, constructive and challenging conversations](#)

Webinar: [How to politely disengage clients](#)

Webinar: [How to handle challenging conversations with clients](#)

Hot tip: [10 tips to get the likeability factor](#)

Coach video: [4 career tips for the underestimated](#)

Coach video: [4 steps to build up an indisputable track record](#)

Article: [5 questions to ask before you connect](#)

Article: [6 blogging tips for Tumblr](#)

Hot tip: [6 steps to building a strong reputation](#)

Hot tip: [6 ways to make a great impression when networking](#)

Hot tip: [7 things you should say every day](#)

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

Coach video: [Building & managing your personal brand](#)

Coach video: [Communicating through stories](#)

Article: [Conversation starters cheat sheet for networking](#)

Article: [Do you talk too much?](#)

Hot tip: [DOs and DONTs of writing a successful blog](#)

Article: [How to build your personal brand on LinkedIn](#)

Coach video: [How to grow your network](#)

Article: [How to impress your boss](#)

Course: [How to make a positive first impression](#)

Course: [How to network inside your organisation](#)

Coach video: [How to structure your elevator pitch](#)

Article: [Make your social media networking count](#)

Article: [Making a good first impression when networking](#)

Hot tip: [Making a truly memorable impression](#)

Fastclass: [Managing Your Online Profile](#)

MicroLearn: [Networking](#)

Article: [Networking with LinkedIn endorsements](#)

Article: [Overcoming your fear of networking](#)

Article: [Phrases for successful businesswomen](#)

Coach video: [Promoting yourself in a political landscape](#)

Coach video: [Segmenting your network](#)
Hot tip: [The 5 new rules of etiquette](#)
Article: [The 60 second sales pitch](#)
Article: [The benefits of self-publishing on LinkedIn](#)
Animated video: [The DOs and DON'Ts of networking](#)
Hot tip: [The first steps to building your personal brand](#)
Coach video: [The importance of reciprocity when networking](#)
Article: [The Law of Reciprocity](#)
Webinar: [The key ingredients to a successful pitch](#)
Podcast: [The mutually beneficial network](#)
Article: [The perfect recipe for charisma](#)
Podcast: [The why, how and who of networking](#)
Coach video: [Why you need to know & share your aspirations](#)
Hot tip: [11 ways to be a great manager](#)
Hot tip: [4 stages of team development](#)
Article: [5 new manager motivation techniques - Ranieri style](#)
Hot tip: [5 ways to reduce your team's stress levels](#)
Article: [6 tips to improve individual well-being at work](#)
Hot tip: [7 tips to giving honest feedback](#)
Hot tip: [7 tips to receive feedback as a manager](#)
Hot tip: [7 tips to succeed as a middle manager](#)
Hot tip: [8 basic rules for every leader](#)

Course: [A good way to deliver bad news](#)
Article: [Are you a generous manager?](#)
Article: [Carrots, sticks and oxytocin](#)
MicroLearn: [Effective delegation](#)
Coach video: [Giving feedback](#)
Coach video: [How to foster inclusion](#)
Article: [How to make new starters feel welcome](#)
Hot tip: [How to manage people older than you](#)
Coach video: [How to receive feedback as a manager](#)
Article: [How to support those returning to work](#)
Podcast: [Managing a successful review process](#)
Article: [Managing multicultural teams](#)
MicroLearn: [Managing virtual teams](#)
MicroLearn: [Mental health](#)
Coach video: [Mental health distress Pt 1: Spotting the signs](#)
Coach video: [Mental health distress Pt 2: Having a conversation](#)
Coach video: [Supporting employees with ADHD](#)
Coach video: [The importance of fostering inclusion](#)
Coach video: [The secrets of team innovation](#)
Article: [Tips for working across time zones](#)
Coach video: [To delegate or not to delegate](#)
Article: [Weigh up niceness against efficiency](#)

Article: [Why do people resist change?](#)

Article: [Why the word TOGETHER can make the difference](#)

Coach video: [Why you need to seek feedback as a manager](#)

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](#)

Article: [3 steps to being more open-minded](#)

Hot tip: [5 tips to boost your commercial awareness](#)

Article: [Artificial intelligence and the future of work](#)

Employer advice video: [Assessing commercial awareness](#)

Employer advice video: [Best Business Advice](#)

Article: [Can using apostrophes correctly help your career?](#)

Employer advice video: [Career development in the public sector](#)

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

Article: [Employability skills](#)

Employer advice video: [Is attitude more important than skill?](#)

Employer advice video: [Learning from experiences](#)

Employer advice video: [Public employee strengths](#)

Employer advice video: [Public employee weaknesses](#)

Employer advice video: [Skill development outside the workplace](#)

Article: [The in-demand skills in the creative industries](#)

Article: [The ultimate skills package](#)

Article: [Top tips for taking initiative at work](#)

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

Employer advice video: [What does commercial awareness mean?](#)

Course: [What is cultural intelligence?](#)

Article: [What is employability?](#)

Explainer video: [Workplace skills explained](#)

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?](#)

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](#)

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](#)

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).

CII Code of Ethics

All our members are required to adhere to the our Code of Ethics, a set of principles ensuring we maintain high standards of integrity, probity and ethical fair dealing.

Ethics are a cornerstone of professionalism, and ethical behaviour is crucial to secure public trust and confidence in the insurance and financial planning profession and to build a reputation which people value.

The CII Code of Ethics has been designed to provide members with practical, realistic guidance to follow.

Our members are required to:

- Comply with the Code and all relevant laws and regulations
- Act with the highest ethical standards and integrity
- Act in the best interests of each client
- Provide a high standard of service
- Treat people fairly regardless of age, disability, gender reassignment, marriage/civil partnership, pregnancy/maternity, race, religion or belief, sex and sexual orientation

Failure to comply with the Code may result in disciplinary action against the member and risk adverse publicity for the member and their organisation.

Download the full Code of Ethics on our website: [Code of Ethics \(PDF\)](#)