



Chartered  
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Institute

Standards. Professionalism. Trust.

# Curiosity (Personal Finance)

Learning  
resources  
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# About Curiosity

Future focussed, is inquisitive and open-minded, shows an interest in what is going on around them, wants to learn and develop, generates new ideas, is creative in their thinking and is open and adaptable to change.

This section outlines the Curiosity 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 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
<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 am interested in my work and show an interest in activities beyond my immediate responsibility
- I reflect on my capabilities, am open to new learning opportunities and continually develop my skills
- I am open to different ways of working
- I think of new ways of approaching issues and offer different ideas
- I am aware of changing business, technological and economic factors

### Band 1 learning resources

Member CPD	Assess corporate e-learning*	Training and courses	Qualification units
<a href="#">What makes a great financial adviser</a>	<a href="#">Workplace skills</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>	

\*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 am interested in why things are done in certain ways, and question beyond the obvious
- I broaden my experience and invest time in learning activities to continually stay up to date and prepare for the future
- I am open to change and communicate and implement its benefits
- I propose realistic, innovative solutions and improvements
- I adapt quickly to changing business, technological and economic factors

### Band 2 learning resources

Member CPD	Assess corporate e-learning*	Training and courses	Qualification units
	<u>Communication and Social Skills</u>	<u>EDII – Digital Minds</u>	<u>General insurance business (IF2)</u>
	<u>Workplace skills</u>	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>	<i>Research exercises and url references throughout units</i>  <i>General (be aware boxes, further reading provided in all units where relevant)</i>

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## Band 3

### Competency standards

- I seek to understand issues in depth to tackle root causes of business challenges or opportunities
- I proactively spot and implement opportunities to coach others to help them learn and develop
- I actively promote and champion change initiatives
- I support and drive innovation, disruptive thinking and new initiatives
- I identify and embrace changes in working practices and implement plans that maximise the benefits of those changes

### Band 3 learning resources

Member CPD	Assess corporate e-learning*	Training and courses	Qualification units
<a href="#">How innovation skills can de-risk your business</a>	<a href="#">Management and Leadership</a>	<a href="#">Dive In Festival</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="#">Supervision in a regulated environment (J07)</a>  <i>General – all our units help students understand issues in depth – for this band, Diploma units would be more suitable</i>

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## Band 4

### Competency standards

- I strive for full mastery of complex issues and how they apply to my customers and business
- I create a culture that allows individuals to learn and develop themselves
- I create and lead strategic change initiatives whilst balancing short term business needs
- I role model creative and disruptive thinking throughout the organisation
- I lead strategic changes in working practices and implement organisational plans that maximise the benefits of those changes

### Band 4 learning resources

Member CPD	Assess corporate e-learning*	Training and courses	Qualification units
<a href="#">Creating an adaptable culture</a>		<a href="#">Dive In Festival</a>	<a href="#">Supervision in a regulated environment (J07)</a>
<a href="#">How to grow your own advisers</a>		<a href="#">EDII – Digital Minds</a>	<i>Option of Advanced Diploma study</i>
		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>	

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# Member CPD

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

Webinar: [Creating an adaptable culture](#)

Webinar: [How innovation skills can de-risk your business](#)

Article: [3 questions to reflect on your experiences](#)

Hot tip: [3 steps to get a sponsor](#)

Article: [3 tips to develop a coaching climate](#)

Hot tip: [4 reasons to find a mentor early in your career](#)

Animated video: [4 simple tricks to become more optimistic](#)

Hot tip: [5 benefits of being a sponsor](#)

Article: [5 simple tricks to become more optimistic](#)

Animated video: [5 steps to uncover your personal values](#)

Article: [5 ways to categorise your strengths & skills](#)

Hot tip: [5 ways to make motivation part of your DNA](#)

Coach video: [6 steps to take the risk out of career conversations](#)

Hot tip: [7 reasons introverts are more successful](#)

Hot tip: [7 tips to find a mentor early on](#)

Hot tip: [Are you a happy person?](#)

Article: [Are you experiencing a quarter-life crisis?](#)

Podcast: [Assessing your own competencies](#)

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

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

Podcast: [Benefits of a mentor after maternity](#)

Article: [Break up with your mentor without burning bridges](#)

Coach video: [Career conversations as a manager](#)

Hot tip: [Career conversations with millennials](#)

Article: [Career self-assessments](#)

Coach video: [Change Your Environment](#)

Article: [Change your morning routine to be more creative](#)

Coach video: [Coaching skills: the importance of listening](#)

Coach video: [Coaching to drive performance: giving feedback](#)

Coach video: [Counteracting boredom at work](#)

Coach video: [Creating a coaching climate](#)

MicroLearn: [Creativity in the workplace](#)

Coach video: [Discovering employee career aspirations](#)

Article: [Doodle to help concentration](#)

Article: [Employee development in a flatter organisation](#)

Hot tip: [Encouraging intrapreneurship in your organisation](#)

Coach video: [Engaging career conversations for Gen Y](#)

Hot tip: [Ensuring quality reflection on work experiences](#)

Article: [Hanging around your heroes is good for your career](#)

Podcast: [How to be a good mentee](#)

Article: [How to be a good mentor](#)

Hot tip: [How to be a great mentor](#)

Article: [How to coach employees that don't want coaching](#)

Webinar: [How to grow your own advisers](#)

Article: [How to help your team develop their careers](#)

Coach video: [How to ring fence time for career conversations](#)

Podcast: [How to set up a mentor relationship](#)

Hot tip: [How to step out of your comfort zone](#)

Article: [How to uncover your full skillset](#)

Article: [How would you describe your working style?](#)

Coach video: [Identifying your working style](#)

Employer advice video: [Importance of understanding your skills](#)

Article: [IQ is not the main indicator of success](#)

Article: [Is what you believe ruining your chance of success](#)

Hot tip: [Key transferable skills you learn in education](#)

Coach video: [Knowing your values](#)

Coach video: [Managing expectations in career conversations](#)

Coach video: [Managing vs. coaching](#)

Coach video: [Men and women: the value in the difference part 1](#)

Coach video: [Men and women: the value in the difference part 2](#)

Hot tip: [Mentoring defined in quotes](#)

MicroLearn: [Mindset](#)

Article: [Myers-Briggs personality types](#)

Article: [Personal values vs. company values](#)

Course: [Popular personality tests](#)

Animated video: [Prepare for success like an athlete](#)

Hot tip: [Questions coaches should ask](#)

Article: [Quick tips to uncover your innovative side](#)

Hot tip: [Quotes to live your career by](#)

Article: [Reasons to reflect on your volunteering experience](#)

Coach video: [Recognising strengths & weaknesses](#)

Course: [Reignite your interest in work](#)

Article: [Reverse mentoring for digital dinosaurs](#)

Coach video: [Reward Yourself](#)

Explainer video: [Self-awareness explained](#)

Article: [Staying motivated in your job](#)

Article: [Strengths vs Skills: what's the difference?](#)

Article: [Structure coaching sessions with the GROW model](#)

Article: [Team member types: which one are you?](#)

Hot tip: [The 4 intelligence types in the office](#)

Article: [The best ways to determine your strengths](#)

Article: [The Big 5 personality test](#)

Article: [The difference between a mentor and a sponsor](#)

Coach video: [The imposter syndrome & how to manage it](#)

Course: [The personal development benefits of mentoring](#)

Article: [The role of the mentee](#)

Podcast: [The rules of a mentoring relationship](#)  
Article: [The ups and downs of a wandering mind](#)  
Coach video: [The value of coaching](#)  
Article: [Understand your attractiveness to employers](#)  
Coach video: [Using psychometrics and assessments](#)  
Webinar: [What makes a great financial adviser](#)  
Employer advice video: [What motivates you?](#)  
Hot tip: [What's your style of working?](#)  
Podcast: [What to look for in a mentor](#)  
Hot tip: [What to look for in a mentor – in quotes](#)  
Coach video: [What's in your transferable skills suitcase?](#)  
Webinar: [Why is everyone talking about Chat GPT?](#)  
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/](https://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](#)

[Communication and Social Skills](#)

[Management and Leadership](#)

# 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](http://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>