



# 2025 Q1

Technical, Business & Management Skills Workshops



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# High Net Worth Insurance

Introduction Level | 3 x CPD Hours

## Suitable For:

This interactive one-day High Net Worth training workshop looks at how this class of insurance builds on the insurance covers available as standard, in particular household insurance policies.

This session also looks at the special features of High Net Worth and how these influence the acceptance and pricing of risks.

## Course Details

Webinar delivery



**Date:** 9th January 2025

**Time :** 9:30am -12:45pm

**Price:** £50 +VAT

## Standard Objectives

- ◆ Understand the potential market for high net worth business and its importance in relation to other classes of business – recognise a typical High Net Worth customer profile
- ◆ Define the additional covers that are offered under a High Net Worth policy compared to standard policy cover
- ◆ Compare High Net Worth policy covers, conditions and exclusions
- ◆ Understand the standard underwriting features for High Net Worth risks, e.g. proposer, location, sums insured etc.
- ◆ Understand the underwriting and pricing of risks unique to High Net Worth customers, e.g. valuables, wines, collections etc.
- ◆ Outline additional covers available to High Net Worth customers, e.g. travel
- ◆ Outline the concept of risk management and its application, with regard to underwriting and surveys for High Net Worth risks, e.g. security
- ◆ Recognise the importance of satisfactory claims settlement for High Net Worth customers

## Workshop Content

- ◆ Defining a High Net Worth customer
- ◆ Standard underwriting risk factors, e.g. Proposer, Location of Buildings, Contents etc.
- ◆ High Net Worth policy covers, conditions and exclusions
- ◆ Specific High Net Worth risks
- ◆ The concept of risk management and its application to High Net Worth risks
- ◆ The principles and procedures for handling High Net Worth insurance claims

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# Wellbeing and Resilience

All Levels | 3 x CPD Hours

## Suitable For:

Resilience is the ability to cope with the challenges, problems and setbacks we face in life, and to become stronger because of them. It relies on different skills and draws on various sources of help, including rational thinking skills, physical and emotional health, and an individual's relationship with those around them.

## Course Details

Webinar delivery

**Date:** 10th January 2025**Time :** 9:30am -12:45pm**Price:** £50 +VAT

## Standard Objectives

By the end of this session, delegates will be able to:

- ♦ Define resilience and explain its importance
- ♦ Differentiate between positive and negative thinking
- ♦ Challenge the way they think
- ♦ Use tools that help them build resilience

## Workshop Content

- ♦ What is resilience?
- ♦ Why is Resilience Important?– Exploring why resilience is important to us as individuals and the attributes of resilient people.
- ♦ Positive Vs. Negative Thinking
- ♦ Overcoming Negative Thinking – The ABC Technique – Looking at; Adversity, Beliefs and Consequences and how understanding this process can help someone overcome negativity.
- ♦ The Ladder of Inference – This model identifies our natural tendency to react to situations based on our past experiences and beliefs
- ♦ How resilient are you?
- ♦ Developing your resilience?

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# Contractors Liability Insurance

Intermediate Level | 3 x CPD Hours

## Suitable For:

This participative workshop covers the liability aspects of JCT contract conditions as well as general liability, with a focus on the contracting trades.

Whilst no previous construction insurance experience is required, a good grounding in the basics of commercial property and liability insurance is essential.

## Course Details

Webinar delivery

**Date:** 16th January 2025**Time :** 9:30am -12:45pm**Price:** £50 +VAT

## Standard Objectives

By the end of this session, delegates will be able to:

- ◆ Show an awareness of Contract Works Insurance and the various ways Insurers provide the cover
- ◆ Understand the content of the insurance clauses within the JCT contract and an understanding of the difference between contractual obligations and insurance requirements
- ◆ Explain the standard structure, and content of Contract Works and Contractors Liability Insurance policies and the optional extras usually available
- ◆ Demonstrate an awareness of the underwriting process and the information insurers require to assess and price risks

## Workshop Content

- ◆ The legal environment for contractors – common law/tort, statutory, contract
- ◆ Health & Safety legislation including the Construction Design and Management Regulations 2015
- ◆ Insurance content (works and liability) of common contract forms – JCT Standard, Intermediate, Minor Works and Sub-Contract forms
- ◆ Non-negligence cover – what is required and why – insurance solutions
- ◆ Usual liability policy wordings for contractors – EL, PL, basic cover, exclusions, common extensions
- ◆ Related covers, e.g. financial loss, professional indemnity, directors and officers, environmental impairment

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# Application of Insurance Principles

Introduction Level | 3 x CPD Hours

## Suitable For:

Suitable for staff working at technician/ frontline insurance level with less than two years' experience. This one-day participative workshop provides an excellent introduction to the principles and practices of insurance. Ideal for trainees and new starters, this session introduces many of the subjects covered by the IF1 examination.

## Course Details

Webinar delivery

**Date:** 21st January 2025**Time :** 9:30am -12:45pm**Price:** £50 +VAT

## Standard Objectives

By the end of this session, delegates will be able to:

- ♦ Explain what insurance is and why it is important
- ♦ Explain the concept and operation of:
  - ♦ Insurable interest
  - ♦ Utmost good faith
  - ♦ Indemnity
  - ♦ Subrogation and contribution
  - ♦ Proximate cause
- ♦ Describe the nature and function of the documentation used in insurance

## Workshop Content

- ♦ What is insurance and why do customers buy it?
- ♦ Insurable interest:
  - ♦ When and how it arises
  - ♦ What distinguishes it from the subject matter of insurance
- ♦ Utmost good faith:
  - ♦ The importance of disclosure of material facts
  - ♦ Those facts that do not need to be disclosed
  - ♦ The rights of the insurer in the event of non-disclosure or misrepresentation
  - ♦ How the FCA affects the rights of insurers
- ♦ The underwriting process:
  - ♦ How underwriters obtain the necessary facts and their underwriting options
  - ♦ The internal and external factors that influence a premium rate
- ♦ Indemnity
  - ♦ How indemnity is assessed
  - ♦ The principal limitations, e.g. sums insured, average clauses, deductibles/excesses, franchises, etc
  - ♦ The process of settling claims including the responsibilities of the insured and insurer
  - ♦ Why and how non-indemnity policies differ

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# Application of Insurance Principles

Introduction Level | 3 x CPD Hours

## Suitable For:

Suitable for staff working at technician/ frontline insurance level with less than two years' experience. This one-day participative workshop provides an excellent introduction to the principles and practices of insurance. Ideal for trainees and new starters, this session introduces many of the subjects covered by the IF1 examination.

## Course Details

Webinar delivery

**Date:** 21st January 2025**Time :** 9:30am -12:45pm**Price:** £50 +VAT

## Workshop Content Continued

- ♦ What insurance is and why customers buy it
- ♦ Insurable interest:
  - ♦ When and how it arises
  - ♦ What distinguishes it from the subject matter of insurance
- ♦ Utmost good faith:
  - ♦ The importance of disclosure of material facts
  - ♦ Those facts that do not need to be disclosed
  - ♦ The rights of the insurer in the event of non-disclosure or misrepresentation
  - ♦ How the FCA affects the rights of insurers
- ♦ The underwriting process:
  - ♦ How underwriters obtain the necessary facts and their underwriting options
  - ♦ The internal and external factors that influence a premium rate
- ♦ Indemnity
  - ♦ How indemnity is assessed
  - ♦ The principal limitations, e.g. sums insured, average clauses, deductibles/excesses, franchises, etc
  - ♦ The process of settling claims including the responsibilities of the insured and insurer
  - ♦ Why and how non-indemnity policies differ
- ♦ Subrogation and Contribution
  - ♦ Their importance in common law and how they support indemnity
  - ♦ How policy terms and conditions modify their common law application
  - ♦ Different methods of calculating contribution
  - ♦ The operation of subrogation and contribution in simple claim scenarios
- ♦ Proximate Cause
- ♦ The principle of proximate cause and how it is applied to claims
- - The nature and function of the documentation used in insurance

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# Engaging and Motivating the Team

All Levels | 3 x CPD Hours

## Suitable For:

Behind every effective team, there is an equally effective manager leading the way in motivating, engaging and connecting with their team members.

The aim of this virtual live training is to raise awareness and understanding of the key characteristics of an effective team by focusing on how to set the environment for individual and team engagement with a focus on Positive Psychology.

## Course Details

Webinar delivery

**Date:** 23rd January 2025**Time :** 9:30am -12:45pm**Price:** £50 +VAT

## Standard Objectives

By the end of this session, delegates will be able to:

- ◆ Know your role and responsibility in terms of motivating and engaging the team
- ◆ Know the key drivers for employee engagement
- ◆ Understand the importance of Positive Psychology on influencing motivation and engagement.

## Workshop Content

- ◆ The role of management in the context of motivation and engagement
- ◆ Your team challenges
- ◆ What is motivation?
- ◆ Tried and tested models
- ◆ What drives employee engagement?
- ◆ 3 core beliefs of engaged workers
- ◆ Positive psychology for improved motivation, performance and engagement
- ◆ Simple questions to test motivation and engagement
- ◆ Action plan and review

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# Construction Insurance

Introduction Level | 3 x CPD Hours

## Suitable For:

This one-day construction insurance training workshop provides an introduction to Contract Works, Contractors All Risks and Contractors Liability Insurance. It is suitable for those who are relatively new to the subject.

Whilst no previous Contract Works experience is required to attend this construction insurance training workshop, a secure grounding in the basics of Commercial Property and Liability insurance is strongly recommended.

## Course Details

Webinar delivery

**Date:** 24th January 2025**Time :** 9:30am -12:45pm**Price:** £50 +VAT

## Standard Objectives

By the end of this session, delegates will be able to:

- ◆ Show an awareness of Contract Works Insurance and the various ways Insurers provide the cover
- ◆ Understand the content of the insurance clauses within the JCT contract and an understanding of the difference between contractual obligations and insurance requirements
- ◆ Explain the standard structure, and content of Contract Works and Contractors Liability Insurance policies and the optional extras usually available
- ◆ Demonstrate an awareness of the underwriting process and the information insurers require to assess and price risks

## Workshop Content

- ◆ Subject Matter
  - ◆ Need for separate insurance
  - ◆ Risks/Property insured
  - ◆ Ways cover can be arranged
  - ◆ Parties and terminology
- ◆ Contract Conditions
  - ◆ Parties involved
  - ◆ JCT Standard Form of Contract
  - ◆ Contractual obligation
  - ◆ Insurance requirements
  - ◆ Contract works, liability, plant
- ◆ Policy Cover – Contract Works
  - ◆ Usual Cover
  - ◆ Exclusions and extensions
  - ◆ Common alternatives
- ◆ Liability Policy Cover
  - ◆ Usual Cover
  - ◆ Exclusions and extensions
- ◆ Construction Design and Management Regulations 2015
- ◆ Placing and rating risks
  - ◆ Key Insurer information requirements
  - ◆ Underwriting features
  - ◆ Risk management
  - ◆ Contract works pricing

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# Director's & Officer's Liability Insurance

Introduction Level | 3 x CPD Hours

## Suitable For:

This interactive workshop is suitable for those new to the subject and looking for a comprehensive background to directors and officers insurances.

The workshop will consider directors duties as laid down in recent legislation. It will consider the type of actions that can be taken against directors and officers and look at the cover normally provided by a directors and officers liability policy.

## Course Details

Webinar delivery

**Date:** 11th February 2025**Time :** 9:30am -12:45pm**Price:** £50 +VAT

## Standard Objectives

By the end of this session, delegates will be able to:

- ◆ Outline who directors and officers are, and what their principal duties are
- ◆ Describe how directors and officers may become liable for their actions
- ◆ Explain why companies may refuse or be prevented from indemnifying directors for claims against them
- ◆ Outline the major benefits of a directors and officers liability insurance policy
- ◆ Identify the principal extensions and exclusions under a directors and officers liability insurance policy
- ◆ Explain how directors and officers liability insurance dovetails with other liability insurances

## Workshop Content

- ◆ Who are directors and officers?
- ◆ Directors' responsibilities, including the Companies Act 2006
- ◆ Sources and types of claim against directors and officers
- ◆ Key policy benefits
- ◆ Policy cover:
  - ◆ Operative clause
  - ◆ Personal reimbursement
  - ◆ Company reimbursement
  - ◆ Principal exclusions
  - ◆ Principal extensions
- ◆ The Corporate Manslaughter and Corporate Homicide Act 2007, gross negligent manslaughter and other relevant legislation
- ◆ Proposal and underwriting process

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# Effective Meeting Strategies for Stronger Client Relationships

All Levels | 3 x CPD Hours

## Suitable For:

This workshop offers valuable guidance on how to build strong customer relationships through effective meeting strategies.

During this session, delegates will learn how to define and achieve clear goals for meetings, and how to measure their effectiveness.

## Course Details

Webinar delivery

**Date:** 12th February 2025**Time :** 9:30am -12:45pm**Price:** £50 +VAT

## Standard Objectives

By the end of this session, delegates will be able to:

- ♦ Plan and prepare for a successful meeting
- ♦ Set clear goals, objectives and an agenda for a meeting
- ♦ Successfully follow up meetings.
- ♦ Effectively take notes and make an accurate record of correspondence

## Workshop Content

- ♦ Reasons for meetings
- ♦ Planning and preparing for a meeting
- ♦ Ensuring participation and control
- ♦ Understanding roles in attending meetings
- ♦ Review and follow up to meetings
- ♦ Keeping accurate records

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# Policy Wording Interpretations

Suitable for All Levels | 3 x CPD Hours

## Suitable For:

This participative webinar will suit anyone who needs a good basic understanding of how general insurance policy wordings operate and how key terms can affect the cover provided. The session will include a number of practical exercises designed to reinforce and embed learning.

## Course Details

Webinar delivery

**Date:** 13th February 2025**Time:** 9:30am -12:45pm**Price:** £50 +VAT

## Standard Objectives

By the end of this session, delegates will be able to:

- ♦ To provide knowledge and understanding of basic policy wordings for general insurance business
- ♦ Know how to apply knowledge of principles concerning the operation of policy conditions affecting claims for general insurance business

## Workshop Content

- ♦ Describe the structure, functions and contents of an insurance contract, including the schedule
- ♦ Explain the meaning and use of common policy conditions and exclusions
- ♦ Explain the distinction between warranties, conditions, representations and exclusions
- ♦ Practical exercises

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# Understanding and Managing Behaviours

All levels | 3 x CPD Hours

## Suitable For:

Effective workplace relationships rely on understanding and managing behaviours. This workshop will help participants recognise various behavioural patterns, understand their impact on team dynamics, and develop strategies to manage behaviours constructively to enhance productivity and collaboration.

## Course Details

Webinar delivery

**Date:** 17th February 2025**Time :** 9:30am -12:45pm**Price:** £50 +VAT

## Workshop Content

1. Introduction to Workplace Behaviours
  - What are workplace behaviours?
  - The role of behaviour in individual and team performance.
  - Understanding the link between attitudes, behaviours, and outcomes.
2. Behavioural Styles and Patterns
  - Exploring common behavioural styles (assertive, passive, aggressive, etc.).
  - Recognizing behaviour triggers and responses.
  - How cultural, personal, and situational factors influence behaviour.
3. Understanding the Impact of Behaviours
  - The effect of positive and negative behaviours on team dynamics.
  - Identifying how behaviours contribute to or hinder productivity.
4. Strategies for Managing Challenging Behaviours
  - Techniques to address disruptive or unproductive behaviours.
  - Conflict resolution strategies.
  - Maintaining professionalism while addressing sensitive issues.
5. Promoting Positive Behaviours
  - Encouraging constructive feedback and recognition.
  - Building a culture of respect and accountability.
6. Building Emotional Intelligence
  - Understanding the role of self-awareness and empathy in managing behaviours.
  - Techniques to regulate your own responses to others' behaviours.
  - Building stronger interpersonal relationships through emotional intelligence.

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# Understanding and Managing Behaviours

All levels | 3 x CPD Hours

## Suitable For:

Effective workplace relationships rely on understanding and managing behaviours. This workshop will help participants recognise various behavioural patterns, understand their impact on team dynamics, and develop strategies to manage behaviours constructively to enhance productivity and collaboration.

## Course Details

Webinar delivery

**Date:** 17th February 2025**Time :** 9:30am -12:45pm**Price:** £50 +VAT

## Standard Objectives

By the end of this session, delegates will be able to:

- ◆ Identify and understand different behavioural patterns in the workplace.
- ◆ Recognise the impact of individual and group behaviours on team dynamics and performance.
- ◆ Develop strategies for effectively managing challenging behaviours.
- ◆ Foster positive behavioural changes to create a more collaborative and productive work environment.

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# Understanding Management and Leadership

All levels | 3 x CPD Hours

## Suitable For:

This training is designed for managers and team leaders seeking to develop their people management skills and elevate their leadership approach.

Through a blend of theory and practical insights, the session explores what effective management and leadership truly entail, offering strategies to adapt your style and empower your team with a dynamic, results-driven approach.

## Course Details

Webinar delivery

**Date:** 25th February 2025**Time :** 9:30am -12:45pm**Price:** £50 +VAT

## Standard Objectives

By the end of this session, delegates will be able to:

- ◆ Clearly understand the differences between management and leadership.
- ◆ Learn to adapt your management style to suit various individuals and situations.
- ◆ Discover how to maximise your team's potential by blending coaching and mentoring techniques.

## Workshop Content

- ◆ The Emotionally Intelligent Manager: Harnessing emotional intelligence to lead effectively.
- ◆ Management vs. Leadership: Bridging theory and real-world experience.
- ◆ Person-Centered Leadership: Balancing your role to prioritize team needs.
- ◆ Leadership Skills and Characteristics: Identifying traits that inspire and motivate.
- ◆ Leadership Styles and Approaches: Understanding when and how to adapt.
- ◆ Directive to Non-Directive Leadership: Transitioning to a more empowering style.
- ◆ Coaching and Mentoring Essentials: What they are—and are not.
- ◆ Practical Application: Using coaching and mentoring principles to enhance workplace conversations.
- ◆ Skill Practice: Hands-on exercises to refine your conversational techniques.
- ◆ Review and Action Planning: Consolidating learning and planning next steps.

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# The Importance of Effective Presentations

All levels | 3 x CPD Hours

## Suitable For:

This workshop is designed for individuals who need to give presentations as part of their role and want to improve their skills. It is suitable for people who are hesitant about presenting, as well as those with some experience who want to enhance their skills.

During the session, participants will have the opportunity to actively develop their new skills by presenting to fellow attendees. Additionally, participants will need to complete some pre-course material before the training session.

## Course Details

Webinar delivery

**Date:** 5th March 2025**Time :** 9:30am -12:45pm**Price:** £50 +VAT

## Standard Objectives

By the end of this session, delegates will be able to:

- ◆ Identify the tools and techniques that are integral to delivering a confident presentation
- ◆ Understand how to structure and plan a presentation based on clearly identified objectives
- ◆ Identify how to command audience trust and attention throughout the presentation
- ◆ Manage nerves in order to project a calm and confident image
- ◆ Deliver a presentation in a lucid and compelling manner
- ◆ Handle questions confidently and competently

## Workshop Content

- ◆ Panic-Free Presentations
  - ◆ The ground rules
  - ◆ Organisation of material
  - ◆ Maintaining audience interest
  - ◆ Managing yourself
  - ◆ Skills Practice
  - ◆ Overcoming fears and worries
  - ◆ Positive inner dialogue
  - ◆ Managing nerves
  - ◆ Structure and delivery
  - ◆ Projecting a positive image
- ◆ Presentation Skills
  - ◆ Using your voice more effectively
  - ◆ Focusing your thoughts
  - ◆ Using notes and visual aids
  - ◆ Managing the audience
- ◆ Skills Practice
  - ◆ Building audience rapport
  - ◆ Persuasion and influence
  - ◆ Communicating the positive
- ◆ Rehearsals and practice
- ◆ Personal action plan

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# Business Interruption Insurance

Introduction Level | 3 x CPD Hours

## Suitable For:

Those with less than 12 months experience of business interruption insurance providing they have a basic grasp of commercial insurance principles and practices.

This participative workshop provides an introduction to the principles and practices of business interruption insurance. It explores the aspects which need to be understood by those involved in providing basic technical or administrative services.

## Course Details

Webinar delivery



**Date:** 6th March 2025

**Time :** 9:30am -12:45pm

**Price:** £50 +VAT

## Standard Objectives

By the end of this session, delegates will be able to:

- ◆ Recognise some of the problems in handling this class of business and understand how the cover works alongside the material damage cover
- ◆ Explain the difference between a standing charge and an uninsured working expense and identify which figures from a set of accounts need to be included in the cover
- ◆ Outline the factors that will affect the setting of a correctly forecasted estimate or sum insured for gross profit, revenue and fees cover
- ◆ Describe the features of a business that will affect the setting of an appropriate Maximum Indemnity Period and know how the indemnity period is established in a claim
- ◆ Identify the main features of a risk that will influence an underwriter in their assessment of acceptability and outline how these might vary for different types of businesses
- ◆ Explain how a simple claim is settled

## Workshop Content

- ◆ A brief look at the main barriers to handling this class of business
- ◆ The material damage proviso
- ◆ An overview of accounts – what costs should typically be included
- ◆ An overview of the more common covers available including gross profit, revenue and fees
- ◆ The main elements of the policy specification showing the extent of cover, important conditions, exclusions and clauses within the wording
- ◆ An overview of declaration linked cover
- ◆ An overview of indemnity period
- ◆ The basic elements of underwriting and rating consideration
- ◆ An overview of the claims process and the role of the loss adjuster in business interruption claims

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# Professional Indemnity Insurance

Introduction level | 3 x CPD Hours

## Suitable For:

This workshop is designed for individuals new to the subject who are seeking a comprehensive understanding of professional indemnity insurance.

We will explore the legal and technical aspects of this type of insurance, including how professionals can incur liability, the coverage typically provided, the specific risks associated with various professions, and an overview of how claims are processed.

## Course Details

Webinar delivery

**Date:** 10th March 2025**Time :** 9:30am -12:45pm**Price:** £50 +VAT

## Standard Objectives

By the end of this session, delegates will be able to:

- ◆ Describe how professional liability might arise under common law, contract and statute
- ◆ Identify what types of professionals and service providers may have a professional indemnity exposure
- ◆ Outline the types of claims made against various professionals
- ◆ Describe the principal reasons why professionals should purchase professional indemnity insurance
- ◆ Outline the coverage provided by a professional indemnity insurance policy
- ◆ Outline the principal extensions and exclusions in a professional indemnity insurance policy

## Workshop Content

- ◆ Duty of care owed by professionals to their clients and third parties
- ◆ Examples of professional negligence claims
- ◆ Differing professional exposures, including accountants, solicitors, surveyors and IT & telecommunications
- ◆ Professional indemnity policy – key elements of cover:
- ◆ Operative clause
- ◆ Claims made considerations
- ◆ Main exclusions/extensions
- ◆ Factors to be considered when setting the limit of indemnity
- ◆ The underwriting process
- ◆ Claims process, including incident reporting and what is a claims circumstance

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# Cyber Risks Insurance

Intermediate Level | 3 x CPD Hours

## Suitable For:

This workshop looks at the cover provided by both conventional insurance covers and those specifically designed to protect against cyber risks.

Although no specific cyber risk insurance knowledge is required, a good level of general property and liability knowledge is recommended.

## Course Details

Webinar delivery



**Date:** 11th March 2025

**Time :** 9:30am -12:45pm

**Price:** £50 +VAT

## Standard Objectives

By the end of this session, delegates will be able to:

- ◆ Understand the main cyber risks and which types of customer could benefit from insurance against cyber risks
- ◆ Understand the extent of cover provided by conventional insurance policies against cyber risks
- ◆ Understand the policy cover, conditions and exclusions of specialist cyber risks insurance policies in the UK
- ◆ Consider the major risk, underwriting and rating considerations of cyber risks insurance
- ◆ Understand how cyber risk insurance claims arise and the issues of dealing with these claims

## Workshop Content

- ◆ What are cyber risks?
- ◆ The impact of cloud computing on cyber risks
- ◆ The cover provided by conventional insurance policies against cyber risks
- ◆ The cover, conditions and exclusions of specialist cyber risks insurance policies in the UK:– Liability– System damage– Business interruption
- ◆ How cyber risks policies relate to other covers such as professional indemnity and crime
- ◆ The cyber policy market, insurers' information requirements and underwriting considerations
- ◆ Examples of cyber risks insurance claims and the issues of dealing with such claims.

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# Supporting Vulnerable Customers

All Levels | 3 x CPD Hours

## Suitable For:

This workshop aims to equip firms with the knowledge and skills to ensure that support is offered to a vulnerable customer so that they can effectively interact, and firms can deliver on their promised services.

## Course Details

Webinar delivery

**Date:** 13th March 2025**Time :** 9:30am -12:45pm**Price:** £50 +VAT

## Standard Objectives

By the end of this session, delegates will be able to:

- ◆ Understand the FCA's expectations on how firms are expected to serve vulnerable customers and organise themselves to do this consistently.
- ◆ Recognise where customers require additional support and respond to those needs accordingly
- ◆ To recognise good practice when providing additional support and how to avoid poor practice.
- ◆ Review vulnerable customer procedures in your firm to determine if they meet the FCA expectations
- ◆ Develop effective processes for recording and addressing vulnerability

## Workshop Content

- ◆ **Recognising a vulnerable customer**
  - ◆ Poor health
  - ◆ Cognitive impairment
  - ◆ Caring responsibilities
  - ◆ Computer literacy & access
  - ◆ Low literacy, numeracy and financial capability skills
- ◆ **The FCA Report – The latest guidance**
- ◆ **Understanding a customer's needs**
- ◆ Ensure your staff have the right skills and to recognise and respond to the needs of vulnerable customers:
  - ◆ Importance of transparency
  - ◆ Product & Service Design
  - ◆ Accessibility & Suitability
  - ◆ How to sensitively record a vulnerability on a customers profile

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# Managing Conflict and Difficult Conversations

All levels | 3 x CPD Hours

## Suitable For:

This workshop will equip attendees with the strategies and techniques to effectively navigate and resolve challenging conversations and situations that can arise in a business setting.

Delegates will learn how to prepare for difficult conversations, manage emotions, communicate clearly and assertively, and identify and respond to different types of difficult behaviour. You will also learn how to diffusing tension, setting boundaries and create solutions.

## Course Details

Webinar delivery

**Date:** 18th March 2025**Time :** 9:30am -12:45pm**Price:** £50 +VAT

## Standard Objectives

By the end of this session, delegates will be able to:

- ♦ Identify and understand the different types of difficult conversations that can arise in a business environment
- ♦ Develop effective communication skills to manage challenging conversations, including active listening, clear expression of ideas, and persuasive speaking techniques
- ♦ Learn how to manage emotions and remain composed during challenging conversations, including techniques to de-escalate tense situations
- ♦ Understand how to adapt communication styles to suit different personality types and communication preferences to create positive outcomes
- ♦ Practice techniques to build trust and rapport, including how to frame conversations in a positive light, manage expectations, and demonstrate empathy

## Workshop Content

- ♦ Why are some situations/conversations difficult
- ♦ Understanding the root cause of conflict and challenging behaviour
- ♦ Reading and using body language accurately
- ♦ Separating the person from the problem
- ♦ Avoiding taking things personally ,remaining calm/composed, in control and professional
- ♦ DESC technique

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# Setting Good Goals and Objectives

All levels | 3 x CPD Hours

## Suitable For:

Goals and objectives in the workplace provide essential guidance and direction. They facilitate planning, motivate employees, and ensure organisations can evaluate and control performance.

This interactive workshop equips participants with the skills to set and manage goals and objectives for optimal team and organisational performance.

## Course Details

Webinar delivery



**Date:** 19th March 2025

**Time :** 9:30am -12:45pm

**Price:** £50 +VAT

## Workshop Content

1. Introduction: The Importance of Goals and Objectives
  - What are goals and objectives?
  - Benefits of having clear objectives in the workplace.
  - The impact of objectives on team performance and organisational success.
2. Linking Strategy to Action
  - Understanding the organisation's vision and strategy.
  - Translating high-level strategy into actionable team objectives.
  - Aligning individual objectives with organisational goals.
3. Creating Effective Objectives
  - Characteristics of well-defined objectives.
  - Introduction to SMART objectives:
4. Discussing and Agreeing on Objectives
  - Techniques for effective communication during objective-setting discussions.
  - Collaborative approaches to agreeing on individual and team objectives.
  - Handling disagreements and ensuring clarity.
5. Managing and Reviewing Objectives
  - Techniques to track progress and ensure objectives are on track.
  - The importance of ongoing feedback and performance management.
  - Adapting objectives in response to changing priorities or circumstances

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# Setting Good Goals and Objectives

CONTINUED

## Suitable For:

Goals and objectives in the workplace provide essential guidance and direction. They facilitate planning, motivate employees, and ensure organisations can evaluate and control performance.

This interactive workshop equips participants with the skills to set and manage goals and objectives for optimal team and organisational performance.

## Standard Objectives

By the end of this session, delegates will be able to:

- ◆ Understand the relationship between organisational strategy and individual objectives.
- ◆ Develop and agree on clear, concise SMART objectives for team members.
- ◆ Confidently and effectively engage in discussions around setting objectives.
- ◆ Monitor and manage individual performance to achieve agreed-upon objectives.

## Course Details

Webinar delivery



**Date:** 19th March 2025

**Time :** 9:30am -12:45pm

**Price:** £50 +VAT

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# Liability Insurance

Introduction Level | 3 x CPD Hours

## Suitable For:

This introductory workshop on liability insurance offers a solid foundation in the principles and practices of general liability insurance. It covers essential aspects that individuals providing basic technical or administrative services need to understand.

Our training focuses on general commercial liability, including employers' liability, public liability, and products liability insurance. However, the principles discussed are applicable to all types of liability insurance.

## Course Details

Webinar delivery



**Date:** 27th March 2025

**Time :** 9:30am -12:45pm

**Price:** £50 +VAT

## Standard Objectives

By the end of this session, delegates will be able to:

- ♦ Identify the main types of liability insurance and why businesses require them
- ♦ Describe how liabilities arise under common law, contract and statute
- ♦ Explain the policy cover provided by Employers' Liability, Public Liability and Products Liability policies
- ♦ Apply the terms and conditions of a combined Liability Insurance policy to various claims
- ♦ Outline the basic elements of liability underwriting
- ♦ Explain the difference between legal liability and policy liability
- ♦ List some recent legal and social trends which have impacted on Liability Insurance

## Workshop Content

- ♦ The Need for Liability Insurance
- ♦ The Main Sources of Liability
- ♦ The Main Provisions of Cover and the Main Hazards Encountered
- ♦ Overview of the UK Legal System
- ♦ How Civil Liability can Attach through Common Law/Tort, Contract or Statute, including a Detailed Overview of the Key Torts (Negligence, Nuisance, Trespass, Defamation and Strict Liability)
- ♦ Typical Policy Structure, Covers, Conditions and Restrictions
- ♦ The Basic Elements of Underwriting Considerations
- ♦ Overview of the Claims process Explaining the Fundamental Difference between Legal Liability and Policy Liability
- ♦ Overview of Recent Legal and Social Trends that have Impacted on Liability Insurance

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A photograph of two young women sitting at a wooden desk, smiling and looking at a spiral notebook. The woman on the left is wearing a yellow cardigan over a colorful patterned top. The woman on the right is wearing a denim jacket over a red top and glasses. On the desk are various items: an open textbook, a ruler, a smartphone, a small potted cactus, a blue folder, and a cardboard box. The background shows a window with a hexagonal pattern.

# Contact us

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