



2026 Q1

Technical, Business & Management Skills Workshops



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High Net Worth Insurance

Suitable for All Levels | 3 x CPD Hours

Summary

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:** 14 January 2026**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

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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Summary

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: 21 January 2026

Time : 9:30am -12:45pm

Price: £50 +VAT

Standard Objectives

- ◆ 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.
- ◆ Recognise the importance of satisfactory claims settlement for High Net Worth customers

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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Application of Insurance Principles

Suitable for All Levels | 3 x CPD Hours

Summary

This 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:** 21 January 2026**Time :** 9:30am -12:45pm**Price:** £50 +VAT

Standard Objectives

- ◆ 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
- ◆ Recognise the importance of satisfactory claims settlement for High Net Worth customers

Workshop Content

- ◆ **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
 - ◇ Including policies, cover notes, certificates, and endorsements
 - ◇ The general exclusions applicable to policies
 - ◇ The purpose and operation of policy conditions

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Contractor's Liability Insurance

Intermediate Level | 3 x CPD Hours

Summary

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:** 27 January 2026**Time :** 9:30am -12:45pm**Price:** £50 +VAT

Standard Objectives

- ◆ 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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Summary

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: 28 January 2026

Time : 9:30am -12:45pm

Price: £50 +VAT

Standard Objectives

- ◆ 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

Summary

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:** 4 February 2026**Time :** 9:30am -12:45pm**Price:** £50 +VAT

Standard Objectives

- ◆ 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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Understanding Management & Leadership

Suitable for All Levels | 3 x CPD Hours

Summary

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.

Course Details

Webinar delivery

**Date:** 5 February 2026**Time :** 1:30pm – 4:30pm**Price:** £50 +VAT

Standard Objectives

- ◆ Understand the differences between management and leadership.
- ◆ Learn to adapt your management style to suit various individuals and situations.
- ◆ Know how to get the best from your team by following 10 great habits.

Workshop Content

- ◆ The Emotionally Intelligent manager – the importance of understanding self and others.
- ◆ Evaluating the difference between management and leadership.
- ◆ Adding value as an effective manager.
- ◆ The spectrum and pros and cons of each management style.
- ◆ Knowing when to manage and when to lead.
- ◆ Balancing the roles and responsibilities of a manager and leader.
- ◆ Transitioning from non-manager to manager. Overcoming challenges.
- ◆ 10 habits of great managers.
- ◆ Mindsets and comfort zones.
- ◆ Evaluating your own style, what works well and what needs changing.
- ◆ Follow up courses to complement this training.

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Effective Meeting Strategies for Stronger Client Relationships

Suitable for All Levels | 3 x CPD Hours

Summary

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: 10 February 2026

Time : 9:30am -12:45pm

Price: £50 +VAT

Standard Objectives

- ◆ 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

Summary

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.

Standard Objectives

- ◆ 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

Course Details

Webinar delivery

**Date:** 12 February 2026**Time :** 9:30am -12:45pm**Price:** £50 +VAT[**Book your place**](#)[Back to contents page](#)

Understanding & Managing Behaviours

Suitable for All Levels | 3 x CPD Hours

Summary

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:** 17 February 2026**Time :** 9:30am -12:45pm**Price:** £50 +VAT

Standard Objectives

- ◆ 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.

Workshop Content

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.

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.

Understanding the Impact of Behaviours

- ◆ The effect of positive and negative behaviours on team dynamics.
- ◆ Identifying how behaviours contribute to or hinder productivity.

Strategies for Managing Challenging Behaviours

- ◆ Techniques to address disruptive or unproductive behaviours.
- ◆ Conflict resolution strategies.

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Professional Indemnity Insurance

Introduction Level | 3 x CPD Hours

Summary

This interactive workshop is ideal for those new to professional indemnity insurance, offering a comprehensive introduction to its legal and technical foundations.

It covers how professionals incur liability, typical policy coverage, key risks across professions, and a brief overview of the claims process.

Course Details

Webinar delivery

**Date:** 4 March 2026**Time :** 9:30am -12:45pm**Price:** £50 +VAT

Standard Objectives

- ◆ 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

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Business Interruption Insurance

Introduction Level | 3 x CPD Hours

Summary

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.

The workshop is ideal for those with less than 12 months experience of business interruption insurance providing they have a basic grasp of commercial insurance principles and practices.

Course Details

Webinar delivery

**Date:** 10 March 2026**Time :** 9:30am -12:45pm**Price:** £50 +VAT

Standard Objectives

- ◆ 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 rating 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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Introduction to Microsoft Excel

Introduction Level | 3 x CPD Hours

Summary

This participative workshop is suitable for new or inexperienced users, who would like to gain confidence with Microsoft Excel and enhance their knowledge through practical exercises .

Course Details

Webinar delivery

**Date:** 11 March 2026**Time :** 9:30am -12:45pm**Price:** £50 +VAT

Standard Objectives

- ◆ Gain confidence in navigating and creating spreadsheets
- ◆ Use of basic formula
- ◆ Applying standard formatting

Workshop Content

- ◆ Screen Layout
- ◆ Data Entry
- ◆ Understanding Error Messages
- ◆ File Management
- ◆ Cell Manipulation
- ◆ The Autofill Function
- ◆ SUM, MIN, MAX, AVERAGE & COUNT Functions
- ◆ Multiple Worksheets
- ◆ Cell Formatting
- ◆ Calculations
- ◆ Basic use of Absolute Referencing
- ◆ Page Setup and Printing
- ◆ Questions, Answers and Requests

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Liabilities - Understanding the relationship between PI, D&O and General Liabilities

Suitable for all levels | 3 x CPD Hours

Summary

This highly participative liability insurance cover training workshop concentrates on the cover provided by the various liability insurances and how they dovetail with each other.

Although no specific liability insurance knowledge is required to attend this liability insurance cover training workshop, a good level of general employers' and public liability knowledge is recommended.

Course Details

Webinar delivery

**Date:** 11 March 2026**Time :** 9:30am -12:45pm**Price:** £50 +VAT

Standard Objectives

- ◆ Outline the key elements of the law in the United Kingdom and how this may vary in other countries
- ◆ List the various types of liability policies available in the United Kingdom
- ◆ Describe the extent of cover provided by general liability insurance policies
- ◆ Describe the extent of cover provided by Professional Indemnity and Directors' and Officers' liability insurance policies
- ◆ Outline the significant exclusions of the various liability insurances and how the covers relate to each other
- ◆ Outline the typical liability insurances that should be considered by different types of organisation

Workshop Content

- ◆ The key elements of the law in the United Kingdom
- ◆ How the law may vary in other jurisdictions and how this can affect the underwriting of liability insurance
- ◆ Identify the various liability policies available in the United Kingdom
- ◆ Who and what does it cover? How is it sold?
- ◆ Claims triggers—The difficulties of moving from one to another
- ◆ Review of the cover provided by the general liability insurance policies. What is excluded? What cover can be bought back as extensions or separate policies?
- ◆ Describe the extent of cover provided by Professional Indemnity and by Directors' and Officers' liability insurance policies Exclusions etc.
- ◆ Which types of organisation typically need what covers

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Managing Conflicts & Difficult Conversations

Suitable for All Levels | 3 x CPD Hours

Summary

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:** 12 March 2026**Time :** 1:30pm –4:30pm**Price:** £50 +VAT

Standard Objectives

- ◆ 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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Summary

This participative property owners insurance training workshop is ideal those with some practical experience of handling or placing commercial property owners insurance who are looking to add to this knowledge.

Our property owners insurance training workshop provides a structured overview of the subject and works well either as a learning opportunity for the less experienced or as a refresher for the more experienced.

Course Details

Webinar delivery



Date: 17 March 2026

Time : 9:30am -12:45pm

Price: £50 +VAT

Standard Objectives

- ◆ Outline the key elements of the law in the United Kingdom and how this may vary in other countries
- ◆ List the various types of liability policies available in the United Kingdom
- ◆ Describe the extent of cover provided by general liability insurance policies
- ◆ Describe the extent of cover provided by Professional Indemnity and Directors' and Officers' liability insurance policies
- ◆ Outline the significant exclusions of the various liability insurances and how the covers relate to each other
- ◆ Outline the typical liability insurances that should be considered by different types of organisation

Workshop Content

- ◆ The major risks faced by property owners – the material damage and business interruption perils
- ◆ Underwriting considerations for standard construction
 - ◆ Composite panels
 - ◆ Multi-tenure
 - ◆ Unoccupied risks
- ◆ Fire risk assessment
- ◆ The policy cover
 - ◆ Material damage
 - ◆ Business interruption
 - ◆ Liabilities
- ◆ Risk management overview

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