

Searchlight
Training the insurance industry

2027 Q1

Technical, Business & Management Skills Workshops

Part of
UKGI
Learning Solutions

Searchlight
Training the insurance industry

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Searchlight
Training the insurance industry

Technical Skills

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.

Course Details

Webinar delivery ☑

Date: 7 January 2027

Time: 9:30am -12:45pm

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

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Management Skills

Coaching & Mentoring

Suitable for all levels | 3 x CPD Hours

Summary

This half day live and interactive training session will help demystify what coaching and mentoring is and will equip managers with practical techniques in how to engage and motivate their team using a coaching style approach.

Course Details

Webinar delivery ☑

Date: 12 January 2027

Time : 9:30am -12:45pm

Standard Objectives

By the end of this session delegates will have:

- Know the difference between formal and information coaching and mentoring
- Know and understand the principles of using a 30 / 70 approach to coaching and mentoring at work
- Have practiced and demonstrated essential coaching skills to improve coaching style conversations
- Have practiced being a coach using a structured framework.

Workshop Content

- The many hats you wear as a manager
- What coaching and mentoring is and is not
- Where coaching fits within the 7 styles of management and leadership
- Adopting the 30 / 70 principle of coaching as a manager
- Evaluating and practising essential coaching skills and competencies
- Using a structured approach when having coaching style conversations
- Practising being a coach

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Business Skills

Understanding Microsoft Excel - Introduction

Introduction Level | 3 x CPD Hours

Summary

An entry level course for new or inexperienced users, who would like to gain confidence with Excel and build knowledge through practical exercises.

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
-

Course Details

Webinar delivery ☑

Date: 13 January 2027

Time: 9:30am -12:45pm

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Searchlight
Training the insurance industry

Technical Skills

Application of Insurance Principles

Introduction Level | 3 x CPD Hours

Summary

Staff working at technician/frontline insurance level with less than two years' experience in insurance
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: 14 January 2027

Time: 9:30am -12:45pm

Standard Objectives

Delegates who successfully complete this workshop 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 Contribution
- Proximate Cause
- Describe the nature and function of the documentation used in insurance.

Workshop Content

- 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 those rights of
  - insurers

- **The underwriting process:**
  - How underwriters obtain the necessary facts and their underwriting options

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Management Skills

Performance Management

Suitable for all levels | 3 x CPD Hours

Summary

This interactive live webinar is aimed at providing an overview what performance management is and the reasons why performance does not meet expectations. We will discuss how to manage a team's performance by setting SMART objectives and measuring performance against these along with techniques to manage underperformance.

Course Details

Webinar delivery ☑

Date: 14 January 2026

Time : 9:30am -12:45pm

Standard Objectives

By the end of the workshop, delegates will be able to:

- Demonstrate and understanding of what performance management is
- Discuss the causes of poor performance
- Explain the need for clear expectations
- Demonstrate how to hold a performance conversation

Workshop Content

- What performance is and is not
- Focusing on strengths and weaknesses
- Establishing clear expectations and goals
- Holding performance conversations

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Business Skills

Effective Meeting Strategies for Stronger Client Relationships

Introduction Level | 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, record and achieve clear goals for meetings, and how to measure their effectiveness.

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, minutes 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

Course Details

Webinar delivery ☑

Date: 19 January 2027

Time: 9:30am -12:45pm

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Technical Skills

Professional Indemnity Insurance

Introduction Level | 3 x CPD Hours

Summary

This professional indemnity insurance training workshop is suitable for those with several years' experience of working with Professional Indemnity insurance and looking to learn more.

Course Details

Webinar delivery ☑

Date: 21 January 2027

Time: 9:30am -12:45pm

Standard Objectives

- Explain how tortuous and contractual liabilities co-exist and how they may differ in their application
- Evaluate the major exposures of different professionals and explain the major differences in coverage offered to them
- Explain recent legal developments impacting on the liability of professionals
- Detail the cover provided by a typical design and build policy
- Detail the underwriting process and explain the principal underwriting considerations
- Examine what processes professionals could use to manage their risk.

Workshop Content

- A recap on the duty of care owed by professionals followed by consideration of some of the standards of care applied
- Employees' personal duty of care
- Comparison of tort and contractual liability – how they co-exist, limitation periods etc.
- Risk assessment exercise applicable to accountants, solicitors, surveyors or IT consultants
- Policy wording comparison
- Factors to be considered when underwriting the professional indemnity risk
- Managing the professional indemnity risk.

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Management Skills

The Art of Management and 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: 26 January 2027

Time : 9:30am -12:45pm

Standard Objectives

By the end of this session delegates will have:

- 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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Searchlight
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Technical Skills

Commercial Property Insurance

Introduction Level | 3 x CPD Hours

Summary

This one-day workshop on commercial property insurance offers a comprehensive introduction to the principles and practices in this field. It covers various aspects of commercial property insurance, including coverage details, terms, conditions, and exclusions, as well as the underwriting process.

Course Details

Webinar delivery ☑

Date: 2 February 2027

Time: 9:30am -12:45pm

Standard Objectives

- The risks associated with commercial organisations
- The different cover levels available
- The main conditions, exclusions and restrictions
- The differing methods of calculating the sum insured
- The principles of underwriting and assessment of risk
- The principles of claims handling
- Testing (optional)

Workshop Content

- Identify the property risks encountered by commercial organisations
- Outline the specific insurance cover available to meet commercial property risks
- Appreciate the implication of the terms, conditions, limitations, exclusions and warranties of a typical commercial property insurance policy
- Understand the importance of adequate sums insured
- Be able to outline the underwriting criteria for commercial property risks
- Appreciate the procedures, requirements and processing of commercial property claims

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Searchlight
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Technical Skills

Business Interruption Insurance

Intermediate Level | 3 x CPD Hours

Summary

This workshop provides a comprehensive examination of the complex features of business interruption insurance. It covers all the essential aspects that professionals involved in placing or underwriting this type of business need to master.

Course Details

Webinar delivery ☑

Date: 3 February 2027

Time: 9:30am -12:45pm

Standard Objectives

- Understand how to effectively address issues in this class of business.
- Learn how gross profit is derived from accounts.
- Explain the workings of the standard gross profit, revenue, and fees policy, and how to select the appropriate cover.
- Recognize the difference between declaration linked and traditional forecasting methods, along with their pros and cons.
- Understand business features that determine the appropriate maximum indemnity period and the implications of choosing incorrectly.
- Outline the cover available under key extensions, including damage away from the customer's premises.

Workshop Content

- A detailed look at the main barriers to handling this class of business
- Covers available – gross profit, revenue, fees, extensions and exclusions
- The main elements of the policy wording – extent of cover, important conditions, exclusions and clauses
- The features of a risk that have a bearing on the setting of the maximum indemnity period and how these affect the underwriter's assessment of EML
- How risk assessment and rating is influenced by the information obtained
- The principles of claims handling and the role of the loss adjuster

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Searchlight
Training the insurance industry

Technical Skills

Construction Insurance

Intermediate Level | 3 x CPD Hours

Summary

This participative workshop is for those with some practical experience of handling or placing contract works insurance, but who are looking to add to this knowledge.

It provides a structured overview of the subject, which will act as either a learning opportunity for those less experienced or a refresher for the more experienced.

Course Details

Webinar delivery ☑

Date: 9 February 2027

Time: 9:30am -12:45pm

Standard Objectives

- Describe the risks involved in contract works insurance
- Explain the difference between contractual obligations and insurance requirements
- Describe how standard contracts such as the JCT clauses can affect the client's insurance arrangements
- Explain non-negligence cover
- Describe the major elements of contract works insurance policies

Workshop Content

- The need for separate insurance, Risks/property insured, Ways cover can be arranged, Parties and terminology
- Contract Conditions: Parties involved, Insurance requirements for Works & Plant under JCT standard form of contract, JCT Minor Works
- Policy Cover – Contract Works: Usual cover, exclusions, extensions, Common alternatives, Maintenance cover, Defects exclusions
- Placing and Rating Risks: Key insurer information needs, Good risks and bad risks, Contract works pricing

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Management Skills

Managing Conflict & Difficult Conversations

Suitable for all levels | 3 x CPD Hours

Summary

This half day interactive live training session is aimed at managers looking to develop the skills and confidence to have difficult conversations at work. This may include colleagues, customers and direct reports.

Course Details

Webinar delivery ☑

Date: 10 February 2027

Time : 9:30am -12:45pm

Standard Objectives

By the end of this session delegates will have:

- Explored their own challenges in having difficult conversations
- Discussed and described the reasons why people react the way they do
- An understanding of their preferred style when dealing with difficult situations and how to flex this style
- Practiced a structured framework for having difficult conversations.

Workshop Content

- Why conflict occurs
- The Elephant in the Room and Zone of Uncomfortable Debate
- The fear of conflict and how to reframe and reduce
- Why people do what they do:
  - The Empathy Gap
  - The Amygdala Hijack
- Styles of conflict and flexing your style
- Trigger statements and how to avoid
- Preparing for your difficult conversation
- Structuring and practising your difficult conversation

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Searchlight
Training the insurance industry

Technical Skills

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: 11 February 2027

Time: 9:30am -12:45pm

Standard Objectives

- Assess liability exposures and recommend appropriate employers' liability insurance coverage and limits for various customers.
- Explain typical coverage under employers' liability insurance.
- Differentiate between employers' liability and workers' compensation covers.
- Outline key requirements of recent health and safety legislation.
- Discuss main factors affecting the underwriting and pricing of employers' liability insurance risks.
- Highlight current issues impacting the employers' liability insurance market concerning claim costs.

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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Searchlight
Training the insurance industry

Technical Skills

Commercial Packages

Introduction Level | 3 x CPD Hours

Summary

This half day interactive webinar is suitable for those who are new to the selling or servicing of Commercial Package covers or those who wish to refresh their knowledge.

Course Details

Webinar delivery ☑

Date: 16 February 2027

Time: 9:30am -12:45pm

Standard Objectives

- Demonstrate an understanding of the benefits of a package policy approach and for which types of customers it is suitable
- Outline the usual policy structure and the variations which might be encountered
- Describe the cover usually available under the major covers – Property Damage, Business Interruption, Money, Liability, Computers, Personal Accident and Goods in Transit
- Outline the principal conditions and exclusions and their impact on the customer
- Describe the information underwriters require and why

Workshop Content

- Commercial Packages v Individual Policies
- Commercial Packages Policy Structure
- Underwriting Considerations and Information Requirements
- Commercial Packages – Major Covers Overview:
    - Property Damage
    - Business Interruption
    - Money
    - Employers/Public/Products Liability
    - Personal Accident
- Principal Policy Conditions and Exclusions

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Searchlight
Training the insurance industry

Technical Skills

Directors & Officers Liability Insurance

Introduction Level | 3 x CPD Hours

Summary

This 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: 23 February 2027

Time: 9:30am -12:45pm

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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Training the insurance industry

Technical Skills

Liability - (Understanding the Relationship Between PI D&O & 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: 25 February 2027

Time: 9:30am -12:45pm

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
- What is excluded?
- Which types of organisation typically need what covers

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Searchlight
Training the insurance industry

Technical Skills

Introduction to Claims Handling

Introduction Level | 3 x CPD Hours

Summary

This webinar is designed to introduce delegates to world of claims handling. It is suitable for people in non-insurance roles wanting an understanding of the claims process and those new to claims handling roles.

Standard Objectives

- The claims process
- Contract law and insurance documentation
- Property claims

Workshop Content

- The claims process and managing expectations
- Claims reserving
- Contract law and Insurance documentation
- The importance of proximate cause and utmost good faith
- Handling Property claims
- Scenarios

Course Details

Webinar delivery ☑

Date: 2 March 2027

Time: 9:30am -12:45pm

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Searchlight
Training the insurance industry

Technical Skills

Cyber Risks Insurance

Introduction Level | 3 x CPD Hours

Summary

Information technology is evolving quickly, and so are the insurance products available to address the cyber risks that emerge.

This workshop will explore coverage provided by both traditional insurance policies and those specifically designed to protect against cyber risks.

Course Details

Webinar delivery ☑

Date: 4 March 2027

Time: 9:30am -12:45pm

Standard Objectives

- Identify which types of customer could benefit from insurance against cyber risks
- Describe the extent of cover provided by conventional insurance policies against cyber risks
- Describe the policy cover, conditions and exclusions of specialist cyber risks insurance policies in the UK
- Outline the major risk, underwriting and rating considerations of cyber risks insurance
- Outline the main considerations when dealing with cyber risks insurance claims

Workshop Content

- What are 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 risk policies relate to other covers such as professional indemnity and crime
- Insurers' information requirements and underwriting considerations
- The main considerations when dealing with cyber risks insurance claims

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Searchlight
Training the insurance industry

Technical Skills

Household Insurance

Introduction Level | 3 x CPD Hours

Summary

This interactive workshop provides a good basic understanding of the principles and practices of household insurance.

Course Details

Webinar delivery ☑

Date: 9 March 2027

Time: 9:30am -12:45pm

Standard Objectives

- Outline the reasons why customers buy household insurance
- Compare and contrast the methods of buying household insurance
- Explain to customers the layout of the policy, its format and structure including the extent of policy cover including common policy extensions
- Recognise the principles of underwriting and how they apply to new and existing customers
- Describe the implication of losses on policy cover, conditions and exclusions
- Consider the principles and procedures for handling claims
- Describe the methods by which claims are resolved satisfactorily

Workshop Content

- What are the motives for customers to buy household insurance
- The policy format and structure
- How policy cover operates, conditions and exceptions – buildings and contents
- Extensions in policy cover:
  - Personal possessions
  - Legal expenses
  - Pets
  - The principles of underwriting household insurance
- The concepts of risk assessment and typical requirements for household customer
- The principles and procedures for handling household insurance claims

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Searchlight
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Technical Skills

High Net Worth Insurance

Intermediate Level | 3 x CPD Hours

Summary

The training workshop focuses on how high net worth (HNW) insurance expands upon standard insurance coverage, particularly household insurance policies.

Our HNW insurance training workshop examines the unique features of high net worth insurance and how these features affect the acceptance and pricing of such risks.

Course Details

Webinar delivery ☑

Date: 11 March 2027

Time: 9:30am -12:45pm

Standard Objectives

- Recognise the potential market for high net worth (HNW) clients and their typical profile.
- Define additional coverages unique to HNW policies compared to standard ones.
- Compare HNW policy covers, conditions, and exclusions.
- Understand standard underwriting features for HNW risks (proposer, location, sums insured).
- Grasp underwriting and pricing for unique HNW items (valuables, collections).
- Identify additional covers for HNW clients
- Understand risk management's role in underwriting and surveys for HNW 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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Searchlight
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Technical Skills

Risk Management

Introduction Level | 3 x CPD Hours

Summary

This training workshop offers a concise introduction to the theory of risk management, with a focus on its application to commercial insurance risks. While no prior expertise in risk management is necessary to attend, participants should have a general understanding of the principles and practices of commercial property and liability insurance.

Course Details

Webinar delivery ✅

Date: 18 March 2027

Time: 9:30am -12:45pm

Standard Objectives

- Demonstrate an awareness of what risk means and its key characteristics
- Demonstrate an understanding of the stages involved in the risk management process
- Adapt risk management theory to practical problems encountered in successfully insuring commercial property, liability and motor fleet risks
- Show an awareness of the purpose of disaster recovery planning and how it can be carried out in practice.

Workshop Content

- Risk and its key characteristics
- Definition of risk management – what it is and how it is done
- Steps in the risk management process, with examples of the main techniques a risk manager will use in identification, analysis, decision making and control
- Companies and risk management – a review of the various corporate governance investigations and their impact on company responsibilities for risk management
- Examples of risk management in practice, with consideration of application to specific commercial insurance classes:
  - Property
  - Liability
  - Motor fleet
- Disaster recovery planning – a brief overview of its purpose and process

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Technical Skills

Motor Trade Insurance

Introduction Level | 3 x CPD Hours

Summary

This workshop is intended for individuals who are new to motor trade insurance. It provides them with the skills necessary for effective daily interactions with both insurers and clients.

Additionally, the workshop encourages participants to explore the wider insurance needs of motor traders.

Course Details

Webinar delivery ☑

Date: 23 March 2027

Time: 9:30am -12:45pm

Standard Objectives

- List the reasons why a motor trader needs special treatment for motor insurance risks
- Explain a motor trader's obligations under the MID
- List trades which require motor trade insurance and the reasons why
- Describe the various rating methods, including named driver, points basis and fleet rating
- Describe the types of underwriting information required to assess a motor trade risk
- Summarise the respective covers under road risks and non-motor policies issued to motor traders
- Give examples of how risk management methods can be applied to the risk assessment process.

Workshop Content

- An examination of the reasons why a motor trader needs a special type of motor insurance policy
- A review of the law relating to motor insurance with particular reference to the MID
- How the different types of road risks policies are rated and an examination of the relevant underwriting factors
- An in-depth analysis of road risks cover and extensions including a comparison of market policy wordings
- A summary of non-motor covers and how these are adapted to suit the motor traders' needs.

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