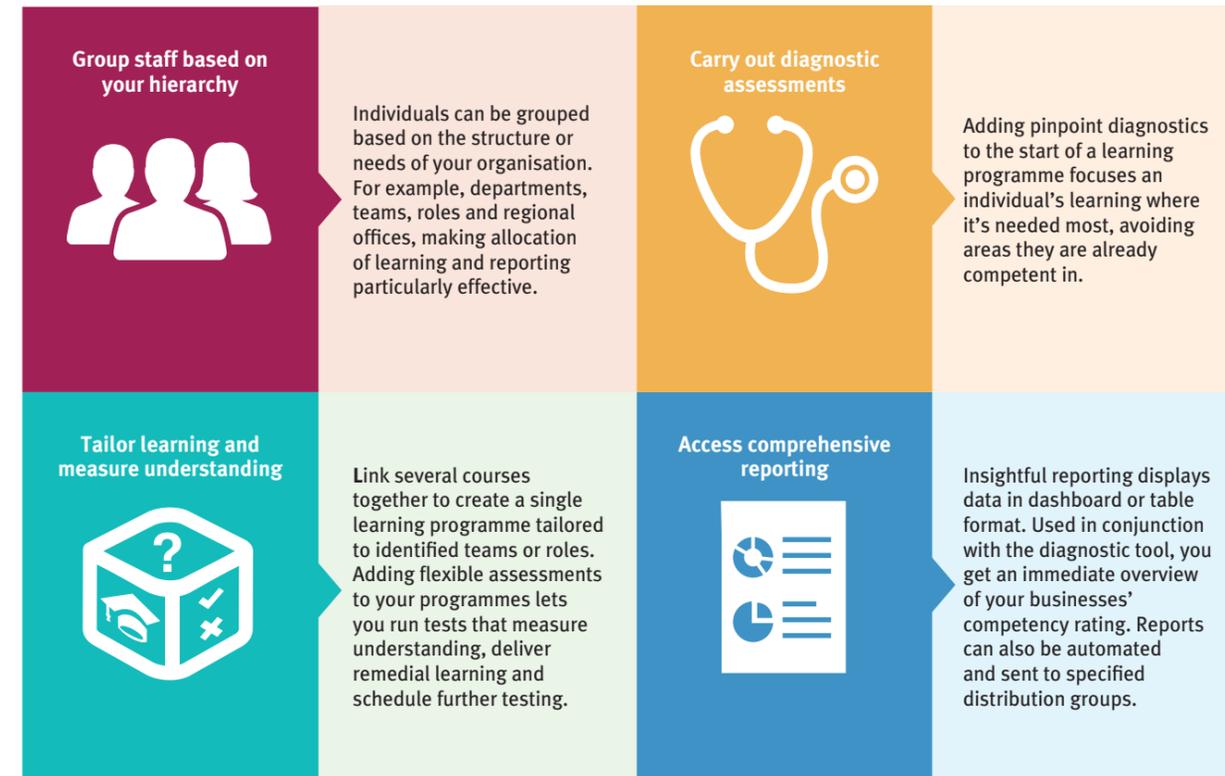


Smart features packed with benefits

Broker Assess contains a number of smart features to help you deliver and measure your staff development programmes.



CII – Professionalism in practice

The CII is committed to helping your teams develop and maintain the knowledge and skills needed to deliver excellent results for your organisation and an outstanding service for your customers.

As the leading professional body serving for insurance and financial planning, our commitment to professional development is backed by an unrivalled understanding of what it takes to deliver first-class training solutions.

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Broker Assess

The leading competence and compliance solution for insurance brokers



working in partnership with:



www.brokerassess.co.uk



Assess breeds success

Keeping staff up-to-date with regulatory, legislative and market changes is a challenge for every insurance broker.

So too is embedding a culture of ethical behaviour and compliance; one that's instinctively reflected in staff conduct.

That's where Broker Assess can help. Developed in partnership with brokers, it reflects the realities of broking in 2016 and beyond, helping to enhance customer service, maintain staff competence and compliance, and improve overall performance.

Simple to implement and easy to manage, Broker Assess helps you deliver, record and track staff learning, assisting you in complying with the FCA's T&C requirements.

Trusted by thousands

Used by over 35,000 UK brokers employed in over 700 firms, Broker Assess covers all basic and core insurance subjects, as well as many specialist areas. It helps new starters and existing staff alike to develop the knowledge they need, and then keep it up-to-date.

A world-class solution

Using the latest online learning trends and technology, Broker Assess is made up of two key components: the learning management system (LMS) and learning content.

Learning management system

Broker Assess is built on an award-winning learning management system, recently ranked the world's top for financial services by the Top 50 LMSs Report 2016*.

Packed with insurance-focused features, the LMS enables the administration, tracking and reporting of staff competence and compliance activities.

Content

For a competency-based system to really deliver value, learning content needs to be job-role relevant and up-to-date. With Assess, this goes without saying.

Assess includes some 450 individual courses, backed by over 5,000 questions to test knowledge and understanding. These are contained within distinct learning catalogues:

- **Regulation and compliance** – 30 courses covering all the key aspects of regulatory compliance in the insurance sector;
- **Introduction to insurance** – 11 courses aimed at those at the beginning of their career in the insurance sector;
- **Foundations of insurance** – 38 courses covering non product-based insurance topics that form the foundation of the sector;
- **Lines of business** – Covering a multitude of topics these are split into three catalogues: personal lines (105 courses), commercial lines (160 courses) and speciality lines (65 courses);
- **London Market** – 15 courses aimed at new starters to the London Market; and
- **The workplace** – 34 courses and videos covering a range of essential business skills.

Simple, useful and effective

The beauty of Broker Assess is its simplicity. It's not only cost-effective, it makes your life easier by doing the hard work for you.

Learners can:

- Access all their training in one place;
- Develop job role relevant knowledge and test their understanding
- Further develop their knowledge and skills by accessing additional learning from the content library; and
- Manage their CPD using the smart tool which synchronises with the CII's CPD planning or recording tool.

Managers can:

- Allocate learning content to staff and set deadlines for completion;
- Monitor and report on staff progress using a variety of off-the-shelf reports; and
- Use the 'My Team' dashboard for a snapshot of how teams are progressing against learning or CPD targets.

Administrators can:

- Create and allocate learning programmes and assessments aimed at different groups in your organisation;
- Add and manage users and groups;
- Allocate content, set completion deadlines, and monitor and report on progress;
- Create enrolment rules to automatically assign learning to users as soon as they are added;
- Pinpoint diagnostics to the start of a learning programme to focus an individual's learning where it's needed most; and
- Automate reminder emails to prompt people to complete their learning.

Consider your options

We understand that not all brokers are the same. So, once you've chosen the content you need, you can choose a platform option to suit your needs.

Broker Assess Standard

Our standard platform gives you access to all the LMS functionality detailed in this brochure, and it's free when you purchase Broker Assess content.

Broker Assess Plus

This comes with all the features of the standard platform, plus a few extras, including the eCreator add-on which lets you create your very own courses. Additionally, you can apply your own corporate branding to the system, helping you to integrate Assess into your wider in-house training and development offering.

Broker Assess Bespoke

This builds on Broker Assess Plus and unlocks a number of advanced LMS features. From T&C workflows and event management, through to a data feed that links to your HR system.

Assess Content

We also offer a content-only option for organisations with an existing learning management system in place, that want to access our market leading content. Our robust bridging solution allows you to access Broker Assess content while retaining course management and reporting in your existing system.

“ Our bespoke version of Broker Assess is a key element in the support that we provide to our network firms and is an integral part of our business. It forms a crucial part of the training of both of our own and our network firms' employees, ensuring that they can demonstrate their competence at any stage of their career and keep up to date with relevant learning. ”

Jenny Hemmings Dip CII
Head of Compliance



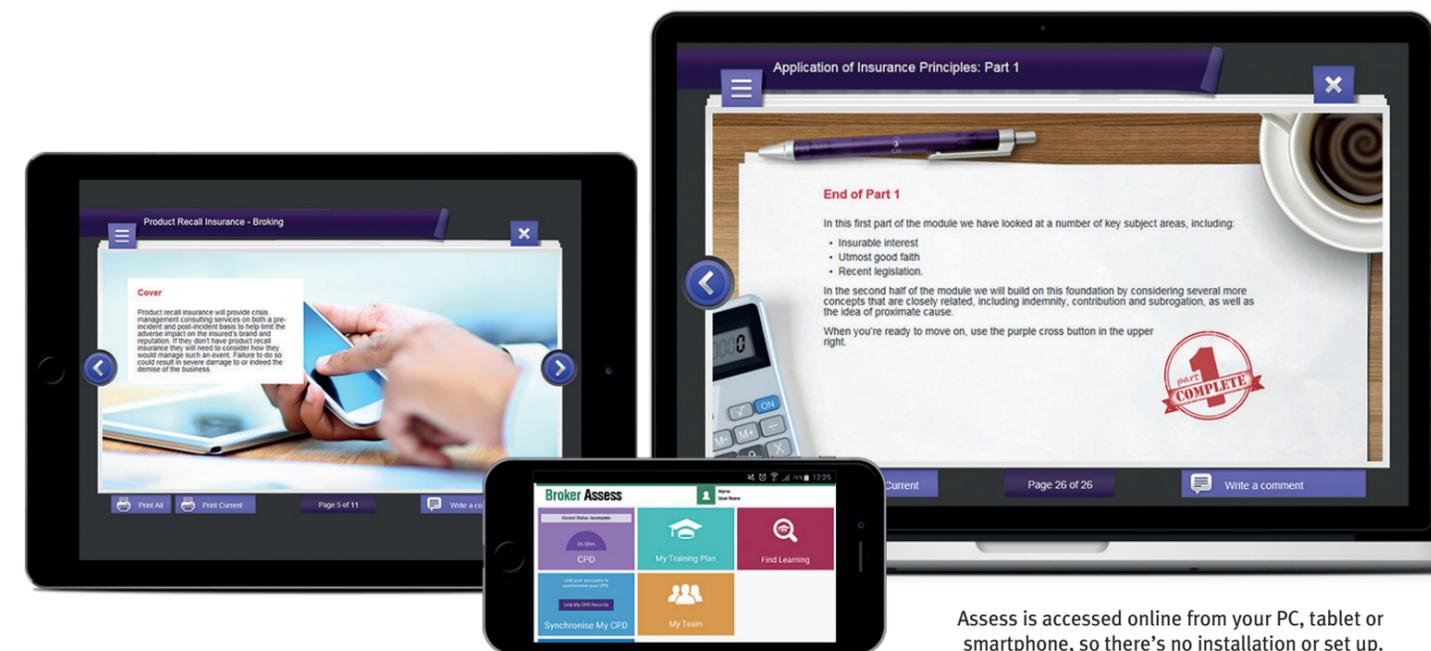
Free 30 day trial

You can experience Broker Assess first-hand by signing up for a free no obligation 30 day trial.

Simply register online by visiting www.brokerassess.co.uk

Talk to us...

To discuss Broker Assess with us and find out more about what it can do for your business, call us on (0)20 7417 4422 or email us at assess.sales@cii.co.uk



Assess is accessed online from your PC, tablet or smartphone, so there's no installation or set up.

* Source: <https://elearning247.org>