



Chartered
Insurance
Institute
Standards. Professionalism. Trust.

To keep up with compliance you need to stay fresh



BrokerAssess
Catering for your every training need.
brokerassess.co.uk

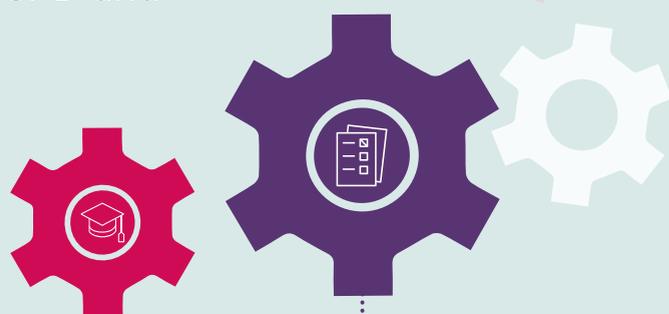


Get
stacks
more
training

Take your organisation's training and development to the next level.

Broker**Assess** is an online training and competency solution designed for insurance brokers. It has all the information and tools in one easy-to-use system.

Discover how Broker**Assess** can develop and assess knowledge across hundreds of product and technical areas. It also helps your organisation meet its regulatory requirements with inbuilt CPD and reporting functionality.



Register for your
14-day free trial
at brokerassess.co.uk

Or call our specialist
customer service team
to get started on
+44 (0)20 8530 0996

Courses

For new employees or experienced professionals, there are training courses for brokers, underwriters, claims specialists and support staff across your business.

Governance, Risk and Compliance

Get the right training your organisation needs to keep up with regulations and compliance, including a specific IDD pathway.



Diagnostics and Testing

Diagnostics, gap analysis, assessments and recruitment tests help you with your training, competency and compliance requirements.

Analytics

Analytics reports are delivered direct to your desktop, tablet or mobile to support training and competency requirements. Broker**Assess** automatically records activity to help you build reports and evidence training and competency activities across your business.

Content

With over 600 courses and 8,000 assessment questions, Broker**Assess** covers the basic principles of insurance and regulation up to the more technical details of general insurance. Content is divided into a range of intuitive catalogues, each of which focuses on a key aspect of the profession.

Learning Management System (LMS)

Complete control over training and development, with features to help you manage training, schedule activities and monitor staff development.

The training and competency solution for insurance brokers

100s of bite-size courses

Courses

BrokerAssess has over 600 courses for your business, from personal and commercial lines to the complexities of London Market products.

Onboarding

The Introduction to Insurance catalogue provides new members of staff with a solid foundation and understanding of how insurance works.

Broking

Designed by brokers for brokers, there are over 50 individual broking courses to support all the product areas, plus an extensive broking operations section on the fundamentals of broking.

Claims

Claims Handling, Fraud, Litigation and Loss Adjusting courses build knowledge and understanding for claims specialists and support staff.

Underwriting

Every product covered on Assess has a specific Underwriting course. In addition, there is an underwriting section covering areas such as policy construction, pricing, delegated authority, subjectivities, conditions, precedents, warranties and much more.

Making it Personal

Create and build your own e-learning courses with the inbuilt authoring tool, or top and tail BrokerAssess courses so they're personalised for your business.

Business Skills

Help your staff build business skills and knowledge with a wide range of short courses from Project Management to Personal Development, HR and Health & Safety.

Pathways

Use pre-built learning pathways or create bespoke learning pathways to build knowledge and understanding across individuals and teams.

Continuing Professional Development (CPD)

The inbuilt CPD tool automatically records completed activities on the system and allows users to record their non-BrokerAssess CPD activities - so all records are in one place.

Governance, Risk and Compliance

BrokerAssess courses are aimed at all levels in your business, right up to the board.

With over 35 regulatory specific courses to choose from, you can be assured BrokerAssess has it covered.

Staying fresh with regulation has never been more critical. From IDD to the Senior Managers & Certification Regime, BrokerAssess builds and checks knowledge across your organisation to stay ahead of regulatory demands.

Insurance Distribution Directive (IDD)

The FCA requires organisations that are distributing insurance products or involved in their distribution, must ensure that their staff are IDD compliant and complete a minimum of 15 hours of CPD each year.

In addition, it is also a requirement that you can evidence knowledge around the 'compulsory' areas outlined by the regulator. Our pre-built IDD core pathways include all the compulsory modules to help you with IDD compliance.

Finally, you will need to evidence that staff can demonstrate product competency, which is easy to do by selecting from the hundreds of courses available. All activity completed on BrokerAssess is automatically captured as CPD.

Senior Managers Regime

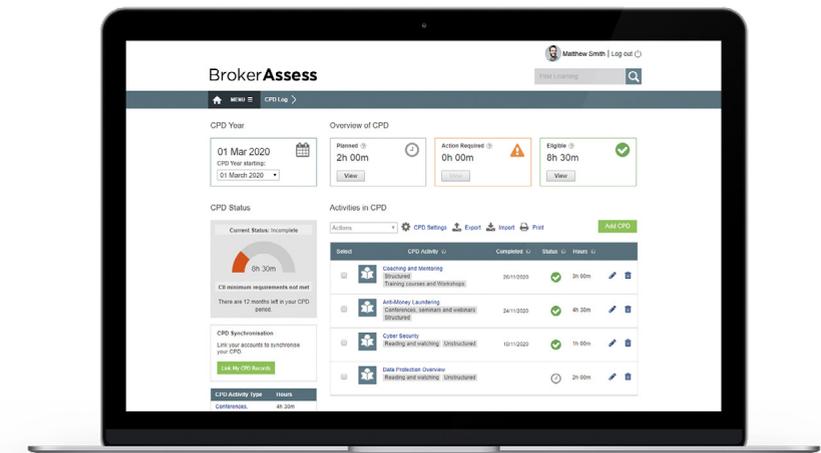
The SM&CR regulations came into force for brokers from December 2019. To help brokers prepare for this, there are courses to cover all the key areas.

Financial Crime

Our Anti-Money Laundering and Countering Terrorist Financing, Bribery and Corruption, Fighting Fraud, and Customer Due Diligence courses address the more common areas of regulation.

Conduct

Courses on Conduct Rules, Conflicts of Interest and Whistleblowing help maintain professional standards across your business.



Diagnostics and Testing

Diagnostics, gap analysis, assessments and recruitment tests – with over 8,000 questions, help meet all your insurance and compliance requirements.

Managing Risk Within Your Business

The integrated diagnostic tool enables you to understand knowledge levels across your business in real time. Using a diagnostic approach lets you test on a broad set of knowledge areas, giving you critical insight into where learning needs to be focused. This approach ensures that staff only need to complete learning where they need to, which in turn, saves you time and takes into account an individual's existing knowledge and understanding.

Gap Analysis

The diagnostic tool measures a user's knowledge against required competencies for their role. Training pathways are then automatically created for each user to help you manage and maintain knowledge across a wide area.

Micro Assessments

To help staff maintain regulatory and technical training each year, the diagnostic functionality supports micro assessments so you can explore many competency areas in one sitting.

Standard Assessments

For standard assessments, simply choose the course, the number of questions and the pass mark, for an assessment to be randomly created from an up-to-date question bank.

Recruitment Tests

Test knowledge and understanding for new joiners with a range of broking, claims and product tests.

Analytics

Good quality reporting drives performance and success. Training activities are automatically recorded to build data reports so you can easily evidence training and competencies across your business.

Flexible Reporting

You can build your own reports or select from a host of pre-built reports and easily view assessment attempts, pathway completions, test scores and results, or activities yet to be completed.

Dashboards

Detailed dashboards bring your training data to life, providing you with a clear view of user activities, completions and scores across teams and departments.

Robo Reporting

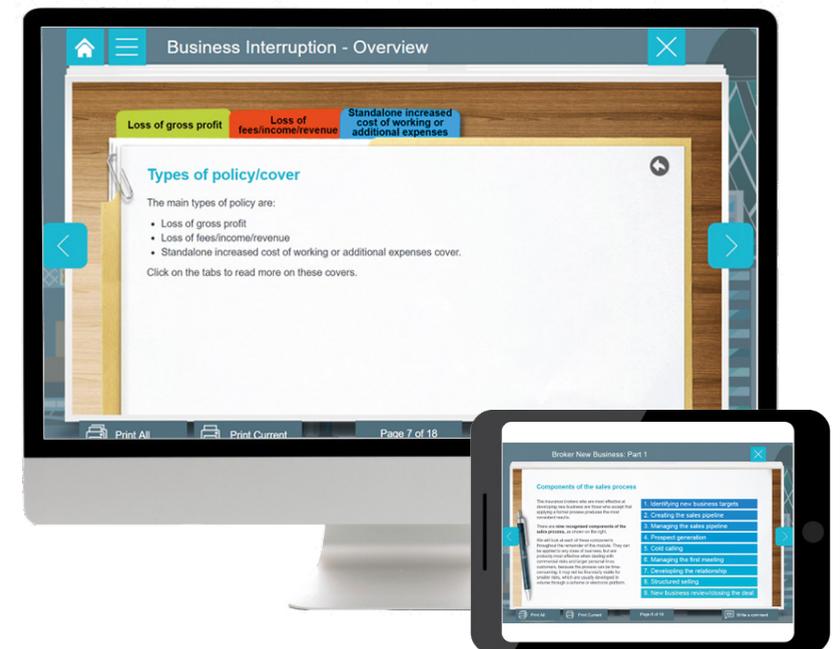
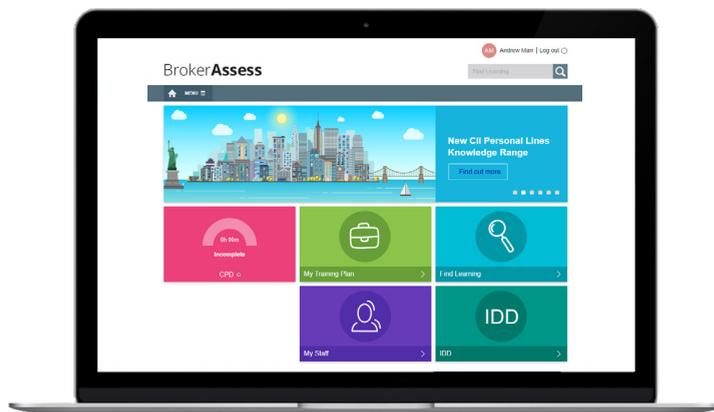
Set up the automatic delivery of reports so they arrive when you need them.

CPD Reports

Users can complete development needs and reflective statements online. BrokerAssess automatically records each activity to help maintain CPD records and run reports. Users can also add offline CPD events to BrokerAssess and CII members can link their BrokerAssess record to their CII CPD record and maintain their activity in one place. In addition, there is a specific 15-hour IDD tool.

The Manager's View

Managers have access to their direct reports progress on all allocated BrokerAssess activities by viewing the managers dashboard from their homepage. This is a key way to ensure that learning pathways are completed.



Content

BrokerAssess caters for your organisation's training needs. Our content is divided into a range of intuitive catalogues that focus on key aspects of the profession. Here are the speciality areas covered.

Insurance Distribution Directive (IDD)

BrokerAssess houses pre-built pathways aimed at all staff captured by IDD to help demonstrate minimum levels of knowledge in specific core areas highlighted by the regulator. In addition, there are over 400 role-specific technical training modules to demonstrate product competency.

Introduction to Insurance

This catalogue houses a collection of courses aimed at new starters to insurance and makes an ideal onboarding solution. These 12 short courses are supported by multiple choice questions covering the basic principles of insurance like proximate cause, insurable interest, contribution, subrogation and much more.

Introduction to the London Market

This catalogue covers everything from the origins of the market, its structures and associations, the processes of delegated authority and binding agreements to regulations and legal requirements. It offers a comprehensive solution to support onboarding programmes.

Foundations of General Insurance

These courses are more in depth than the introduction to insurance courses and cover Broking, Underwriting and Claims in detail. With over 50 courses and supporting questions, this catalogue has it covered.

Governance, Risk and Compliance

Developed with insurance experts, this catalogue is designed to help your business develop a compliant culture and face governance, risk and compliance challenges. Topics include Financial Crime, Conduct, Data Security, SM&CR, IDD and General Insurance Regulation.

Health and Protection

This catalogue covers all the key information on insurance products that will prove useful for all those working in the profession. Topics covered include Critical Illness, Income Protection, Long-Term Care, Private Medical Insurance, Cash Health Plans, Dental Plans and Group Life and Health Insurance. With over 60 courses, this is a very comprehensive look at Health and Protection products.

Personal Lines

From Home, Private Motor, High Net Worth, Pet, Travel, Gadgets and much more, this catalogue covers consumer insurance products in depth. These courses look at products from a policy cover, underwriting, broking and claims perspectives.

Commercial Lines

The BrokerAssess Commercial Lines catalogue houses over 130 courses relating to Property, Motor, Liability, Contractors, Farming, Legal Expenses, Business Travel and Health & Safety.

Specialisms

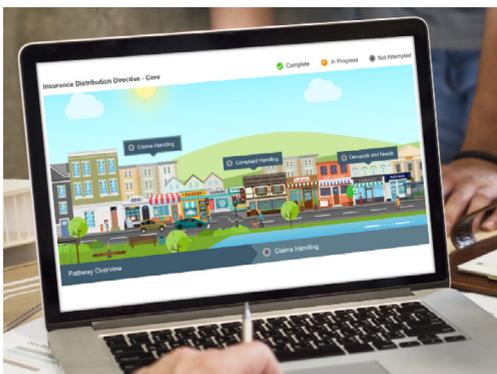
Specialised industries operate outside of the remit of standard personal and commercial covers, and therefore require specialised insurance cover. Courses include Cyber, Marine, Aviation and Space, Environmental, Energy, Bloodstock, Political Risks and Fine Art and Specie.

Business Skills

These short fun courses cover Personal Development, Project Management, HR Health, Safety and Wellbeing.

The online content guide details every module with the number of assessment questions and the relevant CPD time.

Request your FREE digital content guide by emailing brokerassess@cii.co.uk



Training and competency delivered fresh to your desk

Learning Management System (LMS)

Assess gives you access to your own LMS. The powerful platform is packed with features to help you allocate, manage, record and report on all the learning completed on the system. You can also record CPD, schedule activities and monitor staff activity.

Easy Online Access

BrokerAssess is an online training and competency solution enabling easy access 24/7. Everyone with a licence can access the system via a PC, tablet or mobile. There is no installation required, just login to start training - it's so easy.

Customisation and Personalisation

You can customise the standard BrokerAssess site to include your own company logo or create a bespoke site for your business. The inbuilt authoring tool allows you to build e-learning activities and training to suit your requirements.

Easy Admin

BrokerAssess is automated to simplify administration. For example, you can arrange your reports to be sent to you automatically at a set time or day.

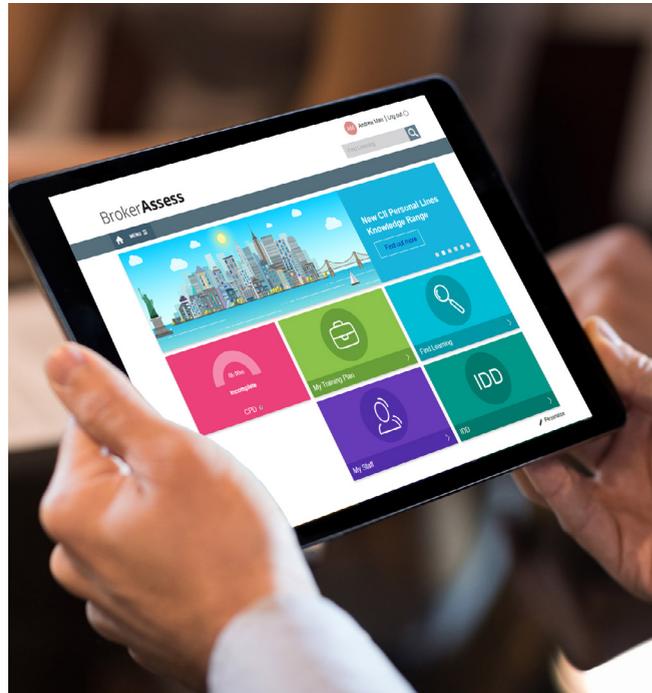
Manager Controls

Managers can easily monitor training activity across their teams and view staff progression on the 'manager view' dashboard. With managers involved in the training management process you can maximise all the benefits of BrokerAssess for your business.

Set Up

If you have a sizeable company with several locations, departments, or teams it is easy to replicate that hierarchical structure on BrokerAssess.

You can create learning pathways and allocate to specific groups to meet their learning and development needs. You can report on an individual's progress or look at specific departments or teams to see if there are any learning areas that need to be addressed.



BrokerAssess is an online training and competency solution designed especially for insurance brokers. It has all the information and tools in one easy-to-use system.

Pricing starts from only £75 per person per annum.

Register for your 14-day free trial at brokerassess.co.uk

Or call our specialist customer service team to get started on +44 (0)20 8530 0996



**Feed
your
knowledge
increase
your
wisdom**



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