



Training the insurance industry

2024 Q2

Technical, Business & Management Skills Workshops



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Suitable For:

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

This session 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: 16th April 2024

Time : 9:30am -12:45pm

Price: £50 +VAT

Standard Objectives

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

- ◆ 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

[Click here to book your place](#)

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: 18th April 2024

Time : 9:30am -12:45pm

Price: £50 +VAT

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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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: 19th April 2024

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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Contractor's Liability Insurance

Intermediate Levels | 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: 24th April 2024

Time : 9:30am -12:45pm

Price: £50 +VAT

Standard Objectives

- Explain the difference between contractual obligations and insurance requirements
- Describe the content of the insurance clauses within the JCT contract relating to liability risks.
- Explain why non-negligence cover may be required and how insurers meet this need
- Describe the standard structure and content of contractor's liability insurance policies, including standard extensions and exclusions

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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Session 1: Engaging & Motivating the Team

All Levels | 3 x CPD Hours

Suitable For:

Suitable for managers and team leaders.

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: 29th April 2024

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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Introduction to Insurance

Introduction Level | 3 x CPD Hours

Suitable For:

This one-day introduction to insurance training workshop provides the ideal introduction to the principles and practices of general insurance.

Wherever possible, this workshop uses practical examples and activities to help the delegate get the most benefit from their attendance.

Course Details

Webinar delivery



Date: 1st May 2024

Time : 9:30am -12:45pm

Price: £50 +VAT

Standard Objectives

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

- ◆ Explain the origins of insurance and why people purchase it
- ◆ Describe the factors involved in assessing and pricing a risk
- ◆ Outline the key legal principles of insurance and identify their application in a day to day context
- ◆ Know how insurance business is transacted
- ◆ Explain the structure of the UK insurance market and the different sectors within it
- ◆ Outline usual terminology, typical policy content and construction and the factors involved in risk assessment and pricing
- ◆ Provide a summary of the regulatory context for the UK insurance market

Workshop Content

- ◆ Definitions and context
- ◆ Why people insure
- ◆ The development of insurance and the insurance market and the different types of organisations in our industry
- ◆ How the insurance process works
- ◆ Key Principles – insurable interest, utmost good faith, proximate cause, indemnity, subrogation and contribution
- ◆ Risk – moral and physical, frequency and severity
- ◆ Proposal forms and slips
- ◆ Policy navigation
- ◆ The principles of claims handling
- ◆ How insurance is regulated

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Business Interruption Insurance

Intermediate Level | 3 x CPD Hours

Suitable For:

This workshop is ideal for those with more than two years' experience of handling business interruption insurance as a separate class of business, as it provides a more detailed study of some of the more complex features of business interruption insurance.

The workshop examines all the main aspects that need to be mastered by those involved in placing or underwriting this class of business.

Course Details

Webinar delivery



Date: 10th May 2024

Time : 9:30am -12:45pm

Price: £50 +VAT

Standard Objectives

- ◆ Understand how to effectively overcome the main problems in handling this class of business
- ◆ Understand how a gross profit figure is derived from a set of accounts
- ◆ Explain in detail the workings of the standard gross profit, revenue and fees policy covers and definitions and demonstrate how these are used to select the most appropriate cover
- ◆ Thoroughly understand the difference between the declaration linked and traditional methods of forecasting the amount to be insured and recognise the pros and cons of both
- ◆ Explain in detail the business features that affect how to set an appropriate maximum indemnity period and understand the implications of selecting an inappropriate period
- ◆ Explain how a simple claim is settled
- ◆ Explain the cover available under some of the main extensions, including damage occurring 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, increased cost of working and additional increased cost of working
- ◆ The main elements of the policy wording – extent of cover, important conditions, exclusions and clauses
- ◆ How to select the correct figures from a set of accounts and then project them forward using the declaration linked and traditional (sum insured) methods
- ◆ 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 adjusted
- ◆ Extensions commonly requested

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Session 2: Delegating and Giving Feedback

Intermediate Levels | 3 x CPD Hours

Suitable For:

Suitable for managers and team leaders.

This course is designed to equip managers and team members with the essential skills and knowledge to master the art of delegation and delivering constructive feedback.

Course Details

Webinar delivery



Date: 14th May 2024

Time : 9:30am -12:45pm

Price: £50 +VAT

Standard Objectives

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

- ◆ Delegate tasks more effectively,
- ◆ Offer constructive feedback, and
- ◆ Foster a productive and growth-oriented work environment

Workshop Content

- ◆ What delegation is and is not
- ◆ Your comfort and stretch zone of delegation
- ◆ What gets in the way of delegation for manager and team member
- ◆ Mindsets for delegation
- ◆ ABCD of delegation – a structured approach to expressing expectations
- ◆ Feedback – Constructive vs Destructive language
- ◆ Giving feedback in a coaching style
- ◆ Feedback practice
- ◆ Action plan and review

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Suitable For:

This session is suitable for all employees working in an office environment.

Our workplace stress training workshop gives delegates the tools to recognise the signs of stress and a practical and realistic selection of stress busters to help take appropriate action where necessary.

Course Details

Webinar delivery



Date: 16th May 2024

Time: 9:30am -12:45pm

Price: £50 +VAT

Standard Objectives

By the end of the session delegates will:

- ◆ Recognise the internal and external symptoms of stress
- ◆ Define the causes of stress
- ◆ Recognise personal stress triggers
- ◆ Put into action strategies to deal with stress
- ◆ Produce an individual action plan to continue to deal with stress

Workshop Content

- ◆ A definition of stress/pressure – what is healthy what is not
- ◆ Recognising causes of stress in the workplace
- ◆ Understanding physical and emotional stress responses
- ◆ Evaluating the impact of stress to employers and employees alike
- ◆ Discovering personal association and reactions to stress
- ◆ Ways to overcome stress – a selection of stress busters
- ◆ Evaluate benefits of alleviating stress such as Increase in self-esteem, confidence and motivation
- ◆ The production of an individual action plan to motivate positive changes
- ◆ Discussion of strategies to sustain positive changes

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High Net Worth Insurance

Intermediate 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: 22nd May 2024

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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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.

A basic knowledge of cyber risks insurance knowledge is required, and a good level of general property and liability insurance knowledge is recommended.

Course Details

Webinar delivery



Date: 23rd May 2024

Time : 9:30am -12:45pm

Price: £50 +VAT

Standard Objectives

- ◆ 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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Microsoft Outlook: Productivity and Efficiency

All Levels | 3 x CPD Hours

Suitable For:

Managers and team leaders .

This session provides an introduction to social styles and personality profiling, and aims to help managers to understand their own natural styles and behaviours and to explore their team's personality types.

Course Details

Webinar delivery



Date: 29th May 2024

Time: 9:30am -12:45pm

Price: £50 +VAT

Standard Objectives

By the end of the session delegates will:

- ◆ Use Outlook to Manage Emails in an Efficient Manner
- ◆ Get The Most Out of Calendar and Tasks
- ◆ Using Search Folders, Rules and Follow Up flags to Reduce Workload

Workshop Content

- ◆ Follow up Flags and Reminders
- ◆ Using the Draft Folder
- ◆ Search Folders
- ◆ Actions – Resend / Recall
- ◆ Tasks
- ◆ Calendar Scheduling Events and Teams Meetings
- ◆ Email to Meeting / Appointment to Email

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Suitable For:

Anyone who has ever wished for more hours in the day to complete tasks. This session explores some crucial planning and prioritisation techniques which will allow attendees to make the most efficient use of their time.

Course Details

Webinar delivery



Date: 4th June 2024

Time: 9:30am -12:45pm

Price: £50 +VAT

Standard Objectives

By the end of the session delegates will:

- ◆ Analysis of present activities
- ◆ The effects of poor time management
- ◆ Setting priorities
- ◆ Time management tools and techniques
- ◆ Good planning
- ◆ Setting SMART objectives
- ◆ Use of daily/weekly/monthly/yearly planners
- ◆ Personal organisation
- ◆ Delegation techniques
- ◆ Achieving work/life balance
- ◆ Dealing with interruptions
- ◆ Managing paperwork
- ◆ Personal action plan for further development of skills

Workshop Content

- ◆ Analyse where their time is currently being spent and where they would prefer it to be spent
- ◆ Plan and prioritise tasks more successfully
- ◆ Use delegation where appropriate
- ◆ Handle interruptions and their impact on time constraints
- ◆ Manage communication and paperwork successfully

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Who We Are Is How We Manage

All Levels | 3 x CPD Hours

Suitable For:

The aim of this session is to learn the importance of knowing yourself and knowing your team by understanding underlying personality traits and how these traits impact on self and influence others.

Course Details

Webinar delivery



Date: 6th June 2024

Time : 9:30am -12:45pm

Price: £50 +VAT

Standard Objectives

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

- ◆ Learn the theory behind Social Styles and its relating to other personality profiling tools
- ◆ Know the components and personalities of Social Styles
- ◆ Know your own preferred style of working and how it impacts and influences others
- ◆ Learn how to adapt your management and communication style

Workshop Content

- ◆ What personality is and how it can define who we are
- ◆ What Social Styles is and how it relates to personality profiling
- ◆ Preferred styles of working and communicating
- ◆ Understanding self and teams and how to flex your communication and management style
- ◆ How to meet the needs of different personality types

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Professional Indemnity Insurance

Introduction level | 3 x CPD Hours

Suitable For:

Suitable for those new to the subject and looking for a comprehensive background to professional indemnity insurance.

This session includes an introduction to legal and technical aspects and looks into how professionals incur liability, the cover normally provided, the risks facing various professions and a brief overview of how claims are dealt with.

Course Details

Webinar delivery



Date: 11th June 2024

Time : 9:30am -12:45pm

Price: £50 +VAT

Standard Objectives

By the end of the session delegates will:

- ◆ 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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Effective Risk Presentations

All Levels | 2 x CPD Hours

Suitable For:

This comprehensive course is designed to provide participants with a deep understanding of client disclosure and maintaining client relationships in the insurance industry.

The course will also delve into pricing and rating influences, as well as potential exposures brokers face when risk capture and recording fall short. Suitable for individuals at all levels of ability, this course is a valuable resource for insurance professionals looking to enhance their knowledge and skills.

Course Details

Webinar delivery



Date: 25th June 2024

Time: 9:30am -12:45pm

Price: £50 +VAT

Standard Objectives

By the end of the session delegates will:

- ◆ Understand the importance of making a fair risk presentation to insurers
- ◆ Know which information should be included in a fair risk presentation, and how to effectively obtain this from a client
- ◆ Be aware of the benefits of effective of risk presentations, for clients, brokers and insurers

Workshop Content

- ◆ Client disclosure and maintaining client relationships
 - ◆ Importance of correct information recording / capture
- ◆ Duty of fair presentation
 - ◆ Effective representation of client information
 - ◆ Information on risk that must be/should be included for individual business classes under commercial combined policy including key risk / rating features
- ◆ Influence of fair risk presentation on underwriting and claims processes
 - ◆ Pricing / rating influences
- ◆ Potential exposures to brokers if risk capture and recording is incorrect / insufficient

[Click here to book your place](#)

Suitable For:

Suitable for the more experienced delegate involved in either underwriting, claims or broking.

This session aims to enhance participants knowledge of principles and practice of liability insurance with particular focus on employers' liability. There is a strong emphasis on recent health and safety legislation and how it has impacted on employers' liability risks.

Course Details

Webinar delivery



Date: 27th June 2024

Time : 9:30am -12:45pm

Price: £50 +VAT

Standard Objectives

- Assess liability exposures and make recommendations for relevant employers' liability insurance coverage and policy limits for different types of customer
- Explain the cover usually provided under employers' liability insurance policies
- Explain the difference between employers' liability and workers' compensation covers
- Outline the key requirements of recent health and safety legislation
- Explain the main considerations which impact on the underwriting and pricing of employers' liability insurance risks
- ◆ Outline the key issues currently affecting the employers' liability insurance market with regard to the cost of claims

Workshop Content

- How liability arises both under common law and statute
- Review of legislation for employers' liability and health and safety at work – compulsory insurance legislation, Health & Safety at Work Act, specific risk regulations including COSHH, noise, RSI, stress, asbestos
- Policy cover and exclusions
- Main underwriting features impacting on employers' liability insurance risk assessment and pricing
- How to set liability limits
- Introduction to risk management and its relevance to employers' liability insurance
- ◆ Claims – handling processes, reserving and recent legal and social trends (Woolf reforms, RIDDOR, rehabilitation, industrial disease funding)

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