

Chartered  
Insurance  
Institute

Standards. Professionalism. Trust.

# Powering Personal Lines Professionals

The Personal Lines Knowledge Range



# Contents

This is an interactive document with  
hyperlinks throughout



3

Introducing  
the Personal Lines  
Knowledge Range

5

Starting with  
the Essentials

7

Free online  
introductory  
course

9

Professionally  
recognised  
qualifications

12

Assess  
learning  
system

14

Membership,  
societies and  
local institutes



# Technical knowledge *and professional service*

## Introducing the Personal Lines Knowledge Range

Welcome to the Personal Lines Knowledge Range – a suite of learning and development assets and tools designed specifically for those in the consumer retail market.

Built around the core product sets of Motor, Home, Travel and Pet, the learning covers the technical aspects of cover, and also ethical content relevant to all staff such as inclusive approaches to customer outcomes and dealing with vulnerable customers. This content will help firms provide a holistic service to customers and respond to increased regulatory demand for evidence of organisational purpose and investing in a positive culture.

Contents

**Introducing the Personal Lines Knowledge Range**

Starting with the Essentials

Free online introductory course

Professionally recognised qualifications

Assess learning system

Membership, societies and local institutes

# Technical knowledge *and professional service continued*

There's something for everyone – from simple animations and short online courses for those just starting out, to professionally recognised qualifications – all designed and built by market practitioners to enable businesses to fill the knowledge gaps and empower staff to deliver expert guidance and support to customers. This also helps staff involved in the distribution of insurance products to work towards the 15 hours of Continuous Professional Development (CPD) expected under IDD each year.

Recognising the challenges many firms have in attracting and retaining quality talent particularly in areas of high turnover, many of the Knowledge Range components are offered for free and in a variety of formats. This makes them suited to individuals with limited time so that they can invest in their own skills and build a rewarding career, adding sustainable value to the business.

Within this guide you will find more information on each of the components of the Personal Lines Knowledge Range and how they fit together.

If you still have questions or would like to view our full Personal Lines offering, head to our website **[cii.co.uk/personallines](https://cii.co.uk/personallines)** or contact our customer services team on:

**Individual learners: +44 (0)20 8989 8464**

**Employers: [business.enquiries@cii.co.uk](mailto:business.enquiries@cii.co.uk)**

Contents

Introducing the  
Personal Lines  
Knowledge Range

Starting with  
the Essentials

Free online  
introductory  
course

Professionally  
recognised  
qualifications

Assess learning  
system

Membership,  
societies and  
local institutes



# Starting with the Essentials

To help your colleagues grasp the basics of insurance products, the Knowledge Range features free 30-minute Essentials modules. The modules act as stepping stones into the world of insurance for those that are new to the sector, or in non-technical roles. Forming an ideal part of an employee induction, firms may wish to use the free modules to familiarise new starters with a particular subject area.

Contents

Introducing the  
Personal Lines  
Knowledge Range

**Starting with  
the Essentials**

Free online  
introductory  
course

Professionally  
recognised  
qualifications

Assess learning  
system

Membership,  
societies and  
local institutes

# Starting with the Essentials continued

## The modules focus on four Personal Lines product areas:

Motor Insurance  
Home Insurance  
Travel Insurance  
Pet Insurance

All modules are easily accessible via the  
CII website: [cii.co.uk/personallines](https://cii.co.uk/personallines)

## Personal Lines insurance mini-guide animations

For new joiners to the profession who wish to gain a general understanding of insurance and personal lines products, we offer free 2-3-minute video animations covering three topics:

- Your guide to the role of insurance
- Your guide to personal insurance products
- Your guide to how personal insurance is sold

These can be accessed on the CII website [cii.co.uk/personallines](https://cii.co.uk/personallines) or on the Assess online learning system for existing license-holders.

Contents

Introducing the  
Personal Lines  
Knowledge Range

**Starting with  
the Essentials**

Free online  
introductory  
course

Professionally  
recognised  
qualifications

Assess learning  
system

Membership,  
societies and  
local institutes

# Springboard to success

## Free online introductory course



**To support an individual's learning journey and offer an easy transition from workplace training into self-directed formal study, we also offer a free online introductory course in Personal Lines insurance.**

Hosted on the FutureLearn platform, *Introducing Personal Lines Insurance* offers a general understanding of insurance, how it works in the consumer retail market, without being specific to one single product. This makes it an ideal starting point for anyone looking to do a formal qualification in the future, or non-technical staff within the sector seeking accessible foundational knowledge.

Contents

Introducing the Personal Lines Knowledge Range

Starting with the Essentials

**Free online introductory course**

Professionally recognised qualifications

Assess learning system

Membership, societies and local institutes

# Springboard to success

## Free online introductory course continued

### Topics covered include:

- Personal Lines insurance
- The meaning of risk
- Structure of the insurance market
- Distributing insurance products
- Key roles in insurance
- Customer service in insurance.

The four-week course consists of a recommended 1-2 hours of study time per week. While there is no exam at the end of the course, learners can upgrade their access to take a test and obtain a completion certificate at the end of the course.

To register for the course online, head to:  
**[cii.co.uk/personallines](https://cii.co.uk/personallines)**

Contents

Introducing the  
Personal Lines  
Knowledge Range

Starting with  
the Essentials

**Free online  
introductory  
course**

Professionally  
recognised  
qualifications

Assess learning  
system

Membership,  
societies and  
local institutes



# Professionally *recognised qualifications*

The professional qualification element of the Personal Lines Knowledge Range comprises four level 2 single-unit Awards focused on specific Personal Lines products:

Award in Motor Insurance

Award in Home Insurance

Award in Travel Insurance

Award in Pet Insurance

The choice of four Awards enables learners to focus on the products they are closest to, gaining an insight in to:

- The need for cover and its benefits
- Insurance legal principles and duties
- Insurance product features
- How cover is arranged and provided
- The principles of delivering good customer service.

Contents

Introducing the  
Personal Lines  
Knowledge Range

Starting with  
the Essentials

Free online  
introductory  
course

**Professionally  
recognised  
qualifications**

Assess learning  
system

Membership,  
societies and  
local institutes

# Professionally recognised qualifications continued

The aim of the Awards is to develop an individual's understanding of insurance in such a way that it can be applied back to their role.

## Awards

With a manageable 20 recommended study hours, the Awards feature learning content specific to Personal Lines, in contrast to the CII's Foundation in Insurance Test, which gives a broader understanding of general insurance. This makes the Awards especially relevant to customer-facing staff or those in support roles.

Enrolling on any of the Awards includes access to an engaging digital course as standard, in addition to the usual study text resources.

To find out more about the Personal Lines Awards, head to: [cii.co.uk/personallines](https://cii.co.uk/personallines)

## Apprenticeships

The CII level 2 Personal Lines Awards can be delivered as part of the Level 2 Financial Services Customer Adviser apprenticeship standard.

To find out more visit: [cii-aspireapprenticeships.co.uk/](https://cii-aspireapprenticeships.co.uk/) or [instituteforapprenticeships.org](https://instituteforapprenticeships.org)

Contents

Introducing the  
Personal Lines  
Knowledge Range

Starting with  
the Essentials

Free online  
introductory  
course

Professionally  
recognised  
qualifications

Assess learning  
system

Membership,  
societies and  
local institutes

# What's next?

By completing at least three of the four Personal Lines Awards, learners will be well on their way to achieving the Certificate in Insurance.

The Certificate in Insurance is a level 3 qualification that enables learners to advance their understanding of insurance principles, functions and products. It provides a more detailed grounding in insurance principles, products and markets including the regulatory environment and the key disciplines of underwriting and claims across the entire insurance sector. The Certificate will assist learners in understanding their role and workplace in more depth and will prepare them for a more detailed study of insurance concepts and processes.

The Certificate in Insurance typically requires three units to complete. These include the core unit requirement: Insurance, Legal and Regulatory (IF1) and a further two units of choice. Completing three Personal Lines Awards satisfies one of these units, with only the core unit and a further unit of choice required for completion.

The pathway to the Certificate in Insurance having achieved three Personal Lines Awards is depicted below.



To see which units contribute towards the Certificate in Insurance, head to: [cii.co.uk/cert-insurance](http://cii.co.uk/cert-insurance)

Contents

Introducing the Personal Lines Knowledge Range

Starting with the Essentials

Free online introductory course

Professionally recognised qualifications

Assess learning system

Membership, societies and local institutes

# Assess Learning System

## A

### Assess

Assess is the must-have training, testing and compliance system for the insurance sector with over 500 insurance related courses on Broker and Insurance Assess. This course catalogue contains Personal Lines insurance content that can be incorporated into a learning pathway by existing Assess license-holders or included as standard with new license purchases.



### Tests

Assess contains over 5,000 questions which allows you to build diagnostics and assessments to meet your compliance requirements and measure knowledge gaps.



### Analytics

Great reporting can only be driven by a powerful engine. All activity on Assess is automatically recorded and you can use this data to build reports. This record-keeping system allows you to easily evidence all training and competency activities undertaken across the business.



### Platform

The Assess learning management system will help you take your training and development to the next level. The powerful platform underpinning Assess is packed with features that help you manage training, schedule activities and monitor staff development.

Contents

Introducing the Personal Lines Knowledge Range

Starting with the Essentials

Free online introductory course

Professionally recognised qualifications

**Assess learning system**

Membership, societies and local institutes

For more information or to request a free trial, email: [business.enquiries@cii.co.uk](mailto:business.enquiries@cii.co.uk)

# Assess Learning System continued



## Regulation

While primarily intended for employees involved in the development and distribution of insurance products, Assess also includes 39 regulation-specific courses aimed at all levels within the business right up to the board, so there is bound to be something for everyone.

To find out more about IDD visit:

[brokerassess.cii.co.uk/go/assess/IDD](https://brokerassess.cii.co.uk/go/assess/IDD)

[insuranceassess.cii.co.uk/go/assess/IDD](https://insuranceassess.cii.co.uk/go/assess/IDD)



## Insurance Distribution Directive (IDD)

Under IDD all staff involved in the distribution of insurance products will be expected to complete 15 hours of CPD each year and demonstrate minimum levels of competency and knowledge in specific core areas.

The CII's IDD portal on Assess provides:

- Pre-set IDD pathways to cover core training
- Assessment facility to test competency levels
- IDD reporting system
- Integrated authoring tool to allow the creation of specific product training
- 400+ role-specific product training modules
- Integrated CPD tool that automatically adds and displays learning hours

The IDD portal can be integrated into any organisation regardless of size and complexity using one of the three solutions: Assess, Assess+ and Hosted content only.

Contents

Introducing the Personal Lines Knowledge Range

Starting with the Essentials

Free online introductory course

Professionally recognised qualifications

**Assess learning system**

Membership, societies and local institutes

# A network of *like-minded professionals*



## Membership

Membership complements professional development by providing access to an unrivalled programme of events and activities throughout the UK all designed to help grow members' networks and develop professional expertise. Members benefit from shared good practice, insights and thought leadership on the issues that matter most in their sector, as well as discounts across a range of learning and development services.

## Societies

The CII has launched three new Societies to support those working in Broking, Underwriting and Claims specialisms to provide professional ethics and culture, good practice guidance, thought leadership and a dedicated programme of continuing professional development specific to their area of work.

Contents

Introducing the  
Personal Lines  
Knowledge Range

Starting with  
the Essentials

Free online  
introductory  
course

Professionally  
recognised  
qualifications

Assess learning  
system

**Membership,  
societies and  
local institutes**

# A network of *like-minded professionals continued*

## Local institutes

Becoming a member of the CII in the UK, the Channel Islands and the Isle of Man, means also becoming a member of a local institute, usually close to home or work.

This network of 56 local hubs is run by dedicated groups of sector professionals, providing a programme of services, typically including:

- Technical, market and regulatory Continuous Professional Development (CPD) events
- Soft skills and business-related training
- Social and networking activities
- Student career guidance and mentoring
- Local news and market information

These events can count towards CPD requirements, if considered relevant to professional development needs.

## Your next steps

The best way to begin using the Personal Lines Knowledge Range is to visit us online. Go to [cii.co.uk/personallines](http://cii.co.uk/personallines) where you can find more detail on all our Personal Lines learning options.

If you cannot find what you are looking for, please contact Customer Service on:

**Individual learners: +44 (0) 20 8989 8464 or  
[customer.serv@cii.co.uk](mailto:customer.serv@cii.co.uk)**

**Employers: [business.enquiries@cii.co.uk](mailto:business.enquiries@cii.co.uk)**

Contents

Introducing the  
Personal Lines  
Knowledge Range

Starting with  
the Essentials

Free online  
introductory  
course

Professionally  
recognised  
qualifications

Assess learning  
system

Membership,  
societies and  
local institutes

The Chartered Insurance Institute  
3rd Floor, 20 Fenchurch Street,  
London, EC3M 3BY

Individual learners:


Tel: +44 (0) 20 8969 8464

Email: [customerserv@cii.co.uk](mailto:customerserv@cii.co.uk)

Employers:

Tel: +44 (0) 20 8530 0996

Email: [business.enquiries@cii.co.uk](mailto:business.enquiries@cii.co.uk)

 [Chartered Insurance Institute](#)

 [@CIIGroup](#)

© The Chartered Insurance Institute 2022

THE CHARTERED INSURANCE INSTITUTE, CII and the CII logo are registered trade marks of The Chartered Insurance Institute.

Ref: PLKNOW (05/22)  
COH\_J013111