



APPRENTICESHIP

Insurance (Team Leader Pathway)

Level 4

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Chartered
Insurance
Institute

**Aspire
Apprenticeships**

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Apprenticeship Framework

The goal of this apprenticeship is to equip learners with the essential skills and knowledge required to succeed in a team leader role within the insurance industry.

The programme prepares learners for roles such as:

- Claims Management Team Manager
- Insurance Sales Team Manager
- Insurance Customer Service Team Manager
- Insurance Brokerage Team Manager

Who is this apprenticeship for?

The Level 4 Higher Apprenticeship in Insurance (Team Leader Pathway) is your gateway to a rewarding career leading a team in the dynamic world of insurance. This nationally recognised qualification equips learners with the knowledge, skills, and experience needed to thrive in the insurance industry.

On completion of this apprenticeship, you will achieve the following:

- Level 4 NVQ Diploma in Insurance (Team Leader Pathway)
- Level 4 CII Diploma in Insurance (Dip CII)
- Level 2 Essential Skills Communication
- Level 2 Essential Skills Application of Number



*Please note that due to the high cost of pre-registration for the CII elements of the programme, a service level agreement for the repayment of fees incurred should learners withdraw from the programme prior to completion is a requisite for enrolment.

Benefits of the apprenticeship programme:

Accelerate Your Career Growth: With the Level 4 Higher Apprenticeship, you'll fast-track your career by gaining invaluable hands-on experience alongside theoretical knowledge. You'll be equipped with the tools to thrive and build a fulfilling career in the insurance industry.

Industry-Recognised Certification: Upon successful completion of this programme, you'll earn an industry-recognised certification, providing you with a competitive edge in the job market. Employer's value the skills and expertise gained through this apprenticeship, opening doors to exciting opportunities.

Practical and Real-World Learning: Our programme emphasises practical, real-world learning. You will practice skills in the workplace collaborating with experienced colleagues and supported by ALS professionals who will guide you through every step of the process.

Tailored Curriculum: Our comprehensive curriculum is designed to meet the demands of the continually evolving insurance industry. You'll cover essential topics such as regulatory arrangements, managing risk, underwriting, claim management, customer relationship management, team management and developing team performance.

Experienced and Knowledgeable Advisors: Throughout your apprenticeship, you'll have access to a network of experienced advisors who will provide guidance, support, and feedback.

Course Delivery

- Typical duration of 24 months.
- Induction session for apprentices and for their line managers.
- 12 full day CII Diploma workshops
- Supported by self-study online resources.
- Monthly 1-2-1 sessions to achieve your NVQ
- 3 exams and 3 assignments for the CII Diploma.
- 4 Essential skills assessment days. (2 Preparation days and 2 Live Task days) **
- 2 hour long essential skills confirmatory tests. **

***Essential Skills activities are not applicable to apprentices with exemptions.*



Level 4 NVQ Diploma in Insurance (Team Leader Pathway)

Course Delivery

This programme will primarily be delivered through 1-to-1 sessions with a member of the ALS delivery team, using a mixture of face-to-face and remote learning sessions. An ALS assessor will meet with the learner, either in the workplace or through digital means (for example, Microsoft Teams) once a month for approximately two hours to support progress.

The units are assessed via a variety of work-based methods including work products, professional discussion, questioning, witness testimony and observation. (this can be done virtually, if required)

Qualification Structure Summary

The Level 4 NVQ Diploma in Insurance consists of units totalling 53 credits.

2 mandatory units, with a total of 10 credits that must be achieved and optional units totalling 43 credits.

Please note: at least 30 credits must be at Level 4 or above.

Unit rules of combination:

- Mandatory Units (Learners must achieve both units) – 10 credits.
- Optional units Group 1 – minimum 27 credits.
- Optional units Group 2 – minimum 16 credits.

What you will learn

This programme is made up of a mixture of mandatory units (these have to be completed by all learners as part of the qualification) and optional units (we will work with you to decide what units are relevant to your role, and your business).

A brief overview of these units is below.

Mandatory Unit	
Unit Title	Level
Provide leadership and direction for own area of Responsibility.	4
Managing your own performance, personal development and insurance industry awareness.	4

Optional Units Group 1 (Minimum of 27 Credits)		
Unit Title	Level	Credits
Managing the business relationship with clients in a financial services environment.	3	4
Evaluating insurance products and services.	3	5
Evaluating risk as an insurance intermediary and advise other intermediaries.	3	5
Carrying out initial assessment and investigating complex insurance claims.	3	5
Processing complex insurance renewals.	3	5
Review underwriting decisions to accept risks.	3	5
Preparing market presentations and soliciting insurance quotations in line with organisational placing Policy.	4	10
Negotiating and agreeing complex insurance cover on behalf of clients.	4	8
Progressing complex insurance renewals as an intermediary.	4	6
Progressing complex mid-term insurance amendments.	4	6
Determining and evaluating clients' insurance requirements for a tailored policy.	4	6
Determining the cover and extent of liability in complex insurance claims.	4	8
Negotiating and settling complex insurance claims.	4	10
Progressing complex claims for uninsured losses.	4	9
Making sure of effective recovery in complex insurance claims.	4	7
Evaluating and deciding whether to underwrite complex new risks.	4	6

Negotiating and determining the conditions under which risk will be underwritten in complex insurance cases.	4	10
Progressing the underwriting of complex insurance policy alterations and mid-term amendments.	4	10
Providing technical advice and support regarding complex insurance matters to others.	4	8
Advising and supporting clients making a claim in complex insurance cases.	4	7
Contributing to evaluations of potential insurance work in line with organisational objectives.	4	6
Determining and reporting trends in insurance business and making recommendations for business development.	4	6
Carrying out audits of insurance claims processes.	4	6
Undertaking a quality audit of insurance casework within your area of responsibility.	4	6
Carrying out a quality audit of insurance work undertaken by suppliers.	4	6
	4	5

Optional Units Group 2 (Minimum of 16 Credits)

Unit Title	Level	Credits
Encourage new ideas and innovation amongst the work team.	3	4
Plan, allocate and monitor work in own area of responsibility.	3	5
Lead and manage meetings.	3	4
Monitor and solve customer service problems.	3	6
Manage or support equality of opportunity, diversity and inclusion in own area of responsibility.	3	4
Build, support, and manage a team.	4	4
Develop working relationships with colleagues and stakeholders.	4	4
Address performance problems affecting team members.	4	3
Support individuals to develop and take responsibility for their performance.	4	4
Manage the achievement of customer satisfaction.	4	5
Handle referred customer complaints.	4	10
Provide learning opportunities for colleagues.	4	11
Develop and evaluate operational plans for own area of responsibility.	5	6
Recruit staff in own area of responsibility.	5	4
Manage a budget for own area or activity of work.	5	7
Developing collaborative relationships with other organisations.	5	7

Have any questions about our Level 4 NVQ Diploma in Insurance (Team Leader Pathway)?

We are here to help. If you have any further questions or enquiries about the main qualification element of the programme, please contact info@alstraining.org.uk



Level 4 CII Diploma in Insurance (Dip CII)

Course Delivery

This element of the programme will be delivered through blended learning with learners attending 12 full day knowledge and technical skills workshops delivered either face to face or virtually using Microsoft Teams on an approximately monthly basis across the 24-month duration of the programme.

Assessment for the CII qualification is through completion of 3 online exams and 3 written assignments aligned to the units of study. Each exam should be completed within 6 months of commencement.

Learners will benefit from CII membership for the duration of the apprenticeship.

Qualification Structure Summary

The Level 4 CII Diploma in Insurance consists of 120 Credits.

On the assumption you already hold your *Certificate in Insurance (Cert CII) and respective 40 credits, you will need to complete three CII units totalling 75 Credits along with the Level 4 NVQ Diploma in Insurance.

*You must hold your Cert CII before undertaking the Level 4 qualification.

What you will learn

This programme is made up of 3 CII units

CII Units		
Unit Title	Level	Credits
M92 Insurance Business & Finance.	4	25
M05 Insurance Law.	4	25
M85 Claims Practice.	4	25

Have any questions about our Level 4 CII Diploma in Insurance (Dip CII)?

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Essential Skills Qualifications

When you agree to undertake an apprenticeship, you may be required to complete Essential Skills as part of your apprenticeship framework.

Essential Skills Wales

The Essential Skills Wales (ESW) will be initially assessed via an online Wales Essential Skills Toolkit (WEST) Assessment. Where a Learner already holds an ESW certificate or equivalent qualification this can provide an exemption and learners will not need to complete that ESW element of the programme. Where a Learner is not exempt an Individual Learning Plan (ILP) will be generated from the initial assessment. The modules delivery will include independent learning via WEST, prior to guided learning sessions preparing the Learner for their assessment. ESWs are assessed via controlled tasks and confirmatory tests for Communication and Number.

Exemptions

If you already hold qualifications, these may be used as 'exemptions' towards your apprenticeship framework. As a result, you will be exempt from achieving that particular Essential Skill, if you wish. This will be discussed with you before you sign up with us, and will also be followed up by your assessor before and during your first visit from us.

Have any questions about Essential Skills?

We are here to help. If you have any further questions or enquiries about Essential Skills element of the programme, please contact info@alstraining.org.uk