

3 February 2014

---

1 Giltspur Street  
London  
EC1A 9DD  
T +44 (0)20 7294 2468  
F +44 (0)20 7294 2400  
www.cityandguilds.com

## City & Guilds

### 600/8080/2 City & Guilds Level 4 Diploma in Insurance

#### OVERVIEW

##### What does this qualification cover?

The Level 4 Diploma in Insurance provides a range of knowledge and practice required to work in a technician or supervisory role within the Insurance industry that the learner is working in or wishes to work in.

, specifically as a Branch Manager or Business and Commercial/Customer Relationship Manager.

This comprises mandatory units;

##### **Technician**

- Managing your own performance, personal development and insurance industry awareness

##### **Team Leader**

- Managing your own performance, personal development and insurance industry awareness
- Provide leadership and direction for own area of responsibility

Plus optional units relevant to their chosen career path;

- Determining and evaluating clients' insurance requirements for a tailored policy
- Preparing market presentations and soliciting insurance quotations in line with organisational placing policy
- Negotiating and agreeing complex insurance cover on behalf of clients
- Evaluating risk as an insurance intermediary and advise other intermediaries
- Progressing complex insurance renewals as an intermediary
- Progressing complex mid-term insurance amendments
- Carrying out initial assessment and investigating complex insurance claims
- Determining the cover and extent of liability in complex insurance claims
- Making sure of effective recovery in complex insurance claims
- Evaluating and deciding whether to underwrite complex new risks
- Negotiating and determining the conditions under which risk will be underwritten in complex insurance cases
- Progressing the underwriting of complex insurance policy alterations and mid-term amendments



- Processing complex insurance renewals
- Providing technical advice and support regarding complex insurance matters to others
- Advising and supporting clients making a claim in complex insurance cases
- Negotiating and settling complex insurance claims
- Progressing complex claims for uninsured losses
- Contributing to evaluations of potential insurance work in line with organisational objectives
- Determining and reporting trends in insurance business and making recommendations for business development
- Carrying out audits of insurance claims processes
- Review underwriting decisions to accept risks
- Undertaking a quality audit of insurance casework within your area of responsibility
- Carrying out a quality audit of insurance work undertaken by suppliers
- Evaluating insurance products and services
- Managing the business relationship with clients in a financial services environment
- Develop working relationships with colleagues and stakeholders
- Lead and manage meetings
- Handle referred customer complaints
- Manage a budget for own area or activity of work
- Provide learning opportunities for colleagues
- Monitor and solve customer service problems
- Build, support and manage a team
- Plan, allocate and monitor work in own area of responsibility
- Encourage new ideas and innovation amongst the work team
- Recruit staff in own area of responsibility
- Manage or support equality of opportunity, diversity and inclusion in own area of responsibility
- Support individuals to develop and take responsibility for their performance
- Address performance problems affecting team members
- Develop and evaluate operational plans for own area of responsibility
- Developing collaborative relationships with other organisations
- Manage the achievement of customer satisfaction

This is a Framework qualification.

### Who could take this qualification?

The Level 4 Diploma in Insurance qualification is designed for learners who want to work within claims, broking or underwriting areas of the insurance industry, or supervise one of these areas.

There are no formal entry requirements for learners undertaking this qualification, though new learners will benefit from achieving one of the following;

- 6774-02 Level 2 Certificate in Providing Financial Services
- 6774-03 Level 3 Certificate in Providing Financial Services

- Advanced Apprenticeship in Providing Financial Services - Pensions, Insurance, Banking, Investments, Debt Collections
- Undertaken CPD using 6774-03 Award in Providing Financial Services

The qualification it is suitable for a wide age range starting at 16.

## **What could this qualification lead to?**

### Will the qualification lead to employment?

This qualification provides the skills and knowledge for a learner to undertake a role within the insurance area of Financial Services sector such as;

- Claims Technician
- Broking Technician
- Underwriting Technician
- Supervisor of Claims, Broking or Underwriting team

### Will the qualification support progression to further learning?

The Level 4 Diploma in Insurance can lead to the following qualifications:

- Higher Apprenticeship in Insurance
- ILM Level 4 or Level 5 Qualifications in Management
- City & Guilds Professional Recognition Awards
- Foundation degree or other Higher Education qualifications.
- Professional qualifications toward Chartered status

### Using this size of qualification

This qualification has been created to provide practical skills and knowledge to allow the learner to perform effectively when dealing with complex insurance claims, acting as a link between clients and insurance companies or assessing risk to make underwriting decisions, with the option to operate at a supervisor level..

The Level 4 Diploma in Insurance is the main qualification within the Higher Apprenticeship in Banking.

Who supports this qualification?

Julie Hunt Managing  
Director **Face to Face**  
**Finance T:** 01603  
625100

Olivia Armstrong  
Talen Acquisition Resource  
**Lockton Companies LLP**  
**T:** 0207933 0000

Claire Hunt  
Head of HR  
**Bluefin**  
**T:** 020 3040 6600

Paula Morris  
Group HR Manager  
**Finch Insurance Brokers**  
**T:** 0161 228 1466

Andy Kay  
Group Compliance & Technical Manager  
**Reich Insurance**  
**T:** 0161 834 8877

Neil McLennan  
Operations Manager & Financial Adviser  
**Warner Financial Services**  
**T: 01953 607313**

Alison Fraser  
People and Engagement Associate  
**RBS Group**