

Working Together

Regional Membership Managers

Working Together

- Introduction
- Ice breaker
- Ground rules

Classroom to Boardroom

Daniel Pedley

Workstream Leader

Classroom to Boardroom

- Attracting, developing and retaining talent in our profession
- Investigating:
 - How to make insurance a career destination of choice.
 - Defining career pathways and supporting progression.
 - Consider skills needs of today and tomorrow.
 - Role of apprenticeships & higher education links.

Questions

- How did you choose this career, or did it choose you?
- What can be done to make our world a career destination of choice?
- Role of LIs and the CII in general.

Westminster Wing

Lawrence Finkle

Workstream Leader

Workstream aim

“To strategise and improve CII engagement with government and regulatory bodies”

Why do it?

Why improve the CII's engagement with government and regulatory bodies?

- The CII's Royal Charter obliges the body to use its position to ensure decisions shape the future of the profession in the **public interest**.
- So that the CII demonstrates that it **leads** the profession.
- So that the CII demonstrates that it is **relevant** to its members by representing and advancing their concerns to decision makers.
- To promote the social and economic value of the profession to decision makers.

Westminster Wing discussion

- How do you think the CII is perceived – by say government, regulators and other membership/ representative bodies?
- What are your views on the CII taking a more active role in its engagement with government/ regulators?
- What are your **top concerns** that you would like the CII to represent on your behalf to government and regulators?
How would you like to hear about this?

Partners on the Journey

Cristina Biagioni

Workstream Leader

Purpose: Rejuvenate the non-learning elements to be a lifetime partner. Build a centralised membership function, operations and common elements of the proposition.

- Membership proposition, tiers and simplification
- Retention
- Benefit/value statements
- Jobs board
- Continuing Professional Development (scheme)

The unanswered questions...

Why do members join?

Why do members stay?

Why do members leave?

How you can help us

- What do you like about membership?
- What do you dislike about membership?
- What is missing?
- How does membership support careers?
- How should it support careers?

Member proposition

- Code of Ethics
- Continuing Professional Development
- Knowledge
- Faculties
- Affinity benefits
- Local institutes and global support
- The Journal
- Qualification and learning discounts
- Designations.

Choose Chartered

Gemma Washington
Workstream Leader

Corporate Chartered status



Titles established in 2007:

- **Chartered Financial Planners**
690 Financial Planning practices (c10000 staff) – mainly small firms
- **Chartered Insurers**
29 insurers (c22000 staff) – mainly commercial lines insurers
- **Chartered Insurance Brokers**
194 Insurance Brokers (c15000 staff) – mainly large or mid size firms
- Approximately 14% market coverage

Chartered perceptions



of firms believe Chartered status has enhanced perceptions of their business among recruits



of firms believe Chartered status has enhanced the perception of their business among prospective clients



of firms say it has helped attract staff



believe it has helped win new business

- Now recognised as a clear indicator of professionalism
- Recognised as a differentiator by the public

Choose Chartered change programme

Focus	Benefit
1. Review of criteria	For better penetration of current titles – appropriate for market developments and corporate structures
2. Process improvements	To improve existing and prospective firm experience
3. Proposition enhancement and expansion	To ensure appropriate market relevance – standards, as well as qualifications
4. Relationships and promotion	To target awareness more effectively
5. Protecting the Chartered title	To ensure the titles bear scrutiny

Relationships and promotion

- Ongoing media campaign to further raise awareness and value of Chartered status among the public, including:
 - National press
 - Web and social media
 - Airports and transport hubs advertising
- Two major campaigns in 2016 reaching around 6 million people each time with multiple opportunities to see (average 4 times)
- Chartered Body Alliance – jointly promoting professional standards with CISI and CB Institute.



Choose Chartered discussion

- What are your thoughts of the Choose Chartered advertising and audience? Should we be doing more in the consumer eye? Where else?
- How might we partner with you to help promote Chartered status?
- How might be promote and grow Chartered on a local, regional, national and international level?
- Are you aware of our marketing materials for Chartered firms; is this something you use? What more can we do?

Open for Business

Lee Travis

Workstream Leader

Open For Business - Key Areas

- Centralised CPD programme
- Creation of Societies
- 'Associate Corporate' membership
- Good Practice and Guidance Hub
- Website redevelopment

Engagement discussion

- What initiatives could we roll out to all LIs to strengthen your position as ambassadors for the CII?
- What would make your roles more rewarding?
- What does a happy, engaged member look like?
- What are the top 3 services the CII should offer to improve its membership proposition for current members and potential members?

Additional questions

- Thinking about the future of the CII, if we were to create a professional body from scratch, what would the new CII look like?
- Have any elements been missed off Open For Business to help engage more with wider members?