



The Insurance
Institute of Leeds
Chartered Insurance Institute

A Changing World Programme of Events

Read more here to find out about upcoming CPD
Webinars & Events

Week commencing: 14th September 2020





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During the week of **14th September 2020**, we are hosting a series of events focusing on how different areas of business and our lives have been affected by or are changing because of the Coronavirus Pandemic.

Please view our programme of events, all bookings to be made via the website [HERE](#).



Virtual Inclusion Escape Room



PDT Global: Monday 14th September, 14:00 (90 Minutes)

Join us for the future of Inclusion training, this dramatic, high-pressure, collaborative experience doesn't just talk about inclusive practice it provides a totally interactive workshop allowing everyone involved to work together to crack the code. It's a race against time to discover what is really meant by inclusion and how bias, power and privilege in the workplace can work against it.

Our inclusion experts, PDT Global will encourage a short debrief on behaviours including any 'lightbulb' moments observed during the game. Towards the end of the session, participants will act on all they have learnt and commit to some chosen personal actions to change their own behaviour and shape the employee experience within their company.

Learning Objectives

By the end of the escape room experience, participants will be able to:

- Reference facts and data relating to inclusion both within and outside of their organisation
- Articulate own micro-behaviours or biases impacting working performance
- Debate the impact of privilege and unwritten rules within the workplace
- Identify activities to enhance own inclusive behaviour
- Understand the importance of learning to 'Like more people' - and the impact upon inclusion

PDT Global is a worldwide diversity and inclusion training consultancy. They enable clients to create inclusive workplaces where everyone with the capability and desire to excel can do so.

With over 20 years of experience in strategy, cultural change and leadership development, we bring the expertise of learning to today's business world and the strategic need to enable diversity through creating inclusive cultures.

[BOOK HERE](#)

Pandemic Insurance – building a solution for the future
Monday 14th September 10:00 – 11:00
Speaker: Stephen Coates



In this webinar Steve Coates (Chief Underwriting Officer at Pool Re) will talk about the opportunities and challenges associated with designing and implementing effective (re)insurance responses to societally catastrophic risks in the UK.

Learning Objectives

By the end of this webinar members would have gained an insight into:

- Existing public-private catastrophe reinsurance facilities in the UK
- Why some insurance perils cannot be insured without some form of Government intervention
- The repercussions of the Covid-19 crisis for the (re)insurance industry, and potential responses
- The role of public-private risk financing in the 2020s

Speaker biography

Steve Coates is Chief Underwriting Officer for Pool Re and has been in post since 2012. He is responsible for all aspects of Underwriting, claims, modelling, exposure management and external retrocession. Prior to this he was Head of UK Property & Casualty at Allianz where he spent 11 years including one in Australia. Before this he worked at Independent Insurance where he ended up as UK Property U/W Manager. He started his career at Eagle Star. Steve is ACII qualified and an expert witness in insurance matters.

[BOOK HERE](#)

Risk Management, Planning & Response in a post Covid World
Wednesday 16th September 10:00 – 11:00
Speaker: Stuart Robertshaw



Over the last couple of months as businesses have started to re-open each has had to re-assess their risk management to make sure that they are able to return to work safely. This session will give us an overview of a Risk Managers perspective on the areas that businesses need to consider, what they need to do when the worst happens and an outbreak occurs and how they plan for the future.

Learning Objectives:

By the end of the session, delegates will understand:

- The areas businesses need to consider when opening up after a full or local lockdown
- How to deal with an outbreak in the business
- Procedures for bringing vulnerable staff back into the workplace
- Business planning for the future

Speaker Biography

Stuart Robertshaw has run his own specialist Risk Management consultancy for 20 years. They specialise in carrying out Health & Safety, Business Continuity and Risk Management programmes for businesses and have been actively involved in working with customers on new processes since the Pandemic hit earlier this year. Stuart is also a multiple past president of the Insurance Institute of Leeds.

Stuart will be kindly donating part of his fee for this presentation to Street Angels, an international charity for which he volunteers.

[BOOK HERE](#)



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Remote Customer Service – How to stay connected in a Virtual World

Wednesday 16th September at 12:00 – 13:00

Speaker: Nick Thomas

Before Covid-19 changed our ways of working we were already moving into the first real hard market in a generation which was always going to result in challenges when dealing with our customers. Throw into the mix almost all communication moving virtual (at least for a while) and this is one of the biggest challenges to our customer relationships we've ever seen. This session will explore communication in this situation, what affects the virtual world is having and how we can get the most out of virtual contact.

Learning Objectives

- Understand the importance of a close client relationship particularly in a hard market
- Understand the challenges pre-Covid and the situation during lockdown and the new normal
- Understand the use of 'perspective' to exploit the opportunities to break client apathy
- Understand how our usual communication is affected by the virtual world and how to adjust.
- Understand how to mitigate the effects of the lack of face to face meetings and exploit the advantages of virtual meetings

[BOOK HERE](#)

How to Manage Remotely

Wednesday 16th September at 16:00 – 17:00

Speaker: Nick Thomas

Most managers and Team Leaders are used to seeing their teams all of the time and haven't had a lot of training on how to switch to managing remotely. This session will look at some of the challenges of managing a remote team including staff engagement, productivity and wellbeing. It will offer guidance on structures and frameworks and skills to improve interactions with remote teams.

Learning Objectives

- Understand the challenges for remote workers and for their managers in terms of physical and mental wellbeing and performance
- Understand the research on the effects of remote working in these areas
- Understand some important structures and frameworks to support remote workers
- To provide some skills for managers in interacting with their remote team
- To provide guidance and skills to remote workers on how to set themselves up to avoid the negative impact of remote working and to maximise productivity

[BOOK HERE](#)

Speaker Biography

Nick offers a unique combination of skills in the UK insurance training sector – an industry sales specialist and a professional coach and trainer. He is an Economics graduate with over 25 years corporate insurance broking experience. He was a highly successful sales producer in the UK broking market before progressing into regional and then national sales leadership roles. In the mid-2000s, Nick developed a chronic health condition; his journey to recovery fostered a new range of interests, and a passion for health, and performance. He studied widely, qualifying as a Master Practitioner in Neuro-Linguistic Programming (NLP), obtaining a Diploma in Life Coaching, before going on to study Corporate/Business Coaching with The Coaching Academy. Nick is also a qualified Holistic Lifestyle Coach and Advanced Exercise Coach. In the last two years Nick has worked in a self-employed capacity in training, coaching, and consulting. He works with a specialist adviser in Insurance sector M&A (Mergers & Acquisitions), and through Nick Thomas & Associates provides wide ranging training solutions to the UK Insurance sector across Sales, Business skills and Technical insurance training.

In recent months, Nick Thomas & Associates have delivered highly acclaimed training and webinar series providing up to the moment solutions to the challenges of the developing 'new normal'.



How We Train the Next Generation

Wednesday 16th September 13:15 – 14:15

Speaker: Helene Speight

As we look to a future with a far greater emphasis on colleagues working from home, this obviously has huge implications for the training programmes we run for new entrants into the industry. This session will be exploring ideas of how we can build solutions for training the next generation of insurance and financial professionals.

In addition, notwithstanding the effects of Covid 19, we examine and identify crucial features of what the next generation expects from an employer. Conversely we also look at how employers can attract and retain talent as well as meeting their own responsibilities to people who will further shape our profession in years to come.

Learning Objectives

By the end of the session, delegates will:

- understand how the landscape for recruitment and people development is changing, particularly as a result of Covid
- understand how new approaches and techniques can enhance your career
- how your team or your business can benefit from the application of new ways to train and develop the Next Generation

Who Should Attend

- People who are starting, or who have recently begun, their careers
- People who are seeking new ideas on how to develop themselves or develop others
- Team leaders, recruiters, managers or anyone in a people management role
- Established business leaders who are looking for new ways to innovate in their business

Speaker Biography

Having begun her working life at Guardian Insurance in Leeds, Helene used her early experiences in insurance as a platform for a stellar career in a wider business field. A move to global giant General Electric followed, eventually resulting in the oversight and leadership of 11 sites worldwide. A subsequent role as Global Talent Director at Intercontinental Hotels Group was followed by another global role, this time as HR Director for the ABB FIA Formula E Championship - the world's first fully- electric international single-seater motorsport series. Helene built the team and led the people strategy from the first race, championing diversity as a strength in team performance evidenced by 50% female representation and 20+ nationalities.

An Executive MBA graduate of Henley Business School, Helene is also very passionate about supporting the younger generations and was appointed an Ambassador of the Princes Trust in 2010 in recognition of her charity work. She is now a trusted host of their national Celebrate Success Awards.



[BOOK HERE](#)

NERG Event: Fire & Fury, when disaster struck: What happened next?

Tuesday 15th September 9:45 – 15:15

Speaker: DAC Beacroft

This event is a follow-up to last year's real-life case study 'Fire and Fury' and looks at what happened following disaster striking at the premises of a leading local manufacturer.

If you missed that event you don't need to worry. We will give you all the details you need to follow our continuing story. The event will be very engaging as DACB plan to show us extracts of mock trials, PACE interviews and what happens at the scene of an incident.

Learning Objectives

At the end of the webinar delegates will be able to demonstrate an understanding of:

- How to consider practical examples of how to deal with the claims
- How to consider issues such as legal privilege and expert evidence
- How to consider practical tips on how to spot fraudulent claims and how to deal with those
- How to review the legal position of a company when a director is invited to an interview under caution by the HSE
- The failure to manage stress in the workplace
- The impact of comments made during an interview on the outcome of a trial in health and safety cases

For more information, please visit the website.

[BOOK HERE](#)

The Future of Recruitment and Talent Management

Thursday 17th September at 10:00 – 11:00

Speaker: Tali Shlomo FCIPD

This discussion session with leading industry experts will look at changes in the sector of recruitment and talent management resulting from the Pandemic. We'll be looking at the new challenges but also benefits presented by virtual recruitment and how these affect entry level starters and more senior staff differently. We'll also be considering the future as we move to a blended approach between working in the office and from home. This will be an interactive session where both Tali and Paul will be taking questions from those attending whether you're a HR professional, Manager or someone that's interested in how recruitment might work for you in the future.

Learning Objectives:

By the end of the session, delegate will understand:

- How to approach talent acquisition in the changing world
- What is the future of recruitment and talent management
- What impact recent changes are having on diversity and inclusion, how to re-look at roles taking into account this perspective
- What impact there has been on the change of roles from office based to home based



Speaker Biography

Tali Shlomo is an internationally recognised HR Director, Diversity & Inclusion (D&I) and Wellbeing thought leader whose achievements were recognised in the 2020 Insurance Business Global 100 influential people for creating inclusive workplace cultures. Shortlisted for Women In Finance Awards 2020 - Ambassador of the Year for her work in supporting women in the workplace and gender equality. Shortlisted for Diversity Champion of the Year 2020 - Financial Adviser Diversity in Finance Awards.



Paul Johnson is a thought leader in sourcing and developing talent, he joined the Davies Group in October of 2018, following their acquisition of his business. He has extensive experience in consulting, outsourcing and recruitment having been involved in leading, creating and building a number of businesses in this field. He is now the Managing Director of Davies Resourcing, who source individuals and teams across insurance, risk and regulated markets.

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Cross Panel Event

Hosted by Greg Wright of the Yorkshire Post

Thursday 17th September, 14:00 – 15:00

Join us for this discussion event where leaders from our industry discuss how things have changed in our sector and what the future is likely to hold post Covid-19.



The panel will be chaired by Greg Wright from the Yorkshire Post and will discuss questions and issues such as:

- The switchover to staff working from home
- How the sector has dealt with the crisis both in terms of amendments to underwriting policy and claims handling
- Do they think that there will be any consumer backlash against the insurance sector/how will this impact the industries reputation moving forwards.
- Whether they think there will be changes to meeting structures etc moving forwards i.e. traditionally there has been a lot of physical travel to visit customers/suppliers and for claims handling

We'll be taking some time for a Q&A opportunity for our audience as well so come along and get answers to your burning questions.



The panel will consist of:

David Gillan, McLarens UK

Neil Wormald, Arch Insurance Company

David Sparkes, British Insurance Brokers' Association

Speaker biographies are available online

[BOOK HERE](#)

Pensions: The Impact of 2020 on Retirement plans
Thursday 17th September 12:00 – 13:00
Speaker: Stephen Wilkinson



The COVID-19 outbreak has created significant turmoil on financial markets. Combine this with uncertain economic climate, business failures and rising unemployment, pension planning is under severe pressure. Yet, our clients are relying on us to make sure their pension plans continue as normal. Stephen will explore the challenges for financial planners and share his ideas on servicing and supporting clients in a crisis.

This presentation is applicable for financial advisers and planners and people accumulating their own pensions (everyone?)

Learning Objectives:

By the end of the webinar the delegates will have gained insights into:

- The dynamics of retirement income planning
- Identifying and supporting vulnerable clients
- The benefits of cashflow modelling and wider financial planning
- Adapting ongoing adviser service to the changing needs of the client

Speaker Biography:

Stephen Wilkinson FCII APFS has worked in the insurance and financial planning business for 52 years. He is a chartered and certified financial planner specialising in later life advice and retirement planning. His career has involved working in insurance claims, underwriting, broking and now financial planning. He is Life Vice President Insurance Institute of York and Chartered Champion for the Yorkshire Region Personal Finance Society. He has worked on local, regional and national committees for the CII and PFS. He is a liveryman of the Worshipful Company of Insurers and a Freeman of the City of London.

[BOOK HERE](#)

The UK & Global Economy after the Covid-19 Pandemic
Friday 18th September 11:00 – 12:15
Speaker: Professor Trevor Williams



Join expert and experienced economist Trevor Williams as he cuts through the noise, demystifying economics. This keynote session will give a key economics update with particular emphasis on our sector including such relevant subjects as what are the future prospects for the country, how will we pay for the increase in the government debt that is underway, who will the winners and losers be? This is sure to be a fascinating session as anyone who has previously heard Trevor speak will attest.

Learning Objective:

By the end of this seminar you will be able to understand the impact of the Coronavirus Pandemic on the UK and Global Economy, supported by current market trends and expert analysis.

If you need any more information about what Trevor is going to cover during his talk he will be addressing questions such as:

- what are the numbers currently telling us?
- what trends are being seen
- the impact of so much home working / furlough / job losses
- who are the winners and losers?
- the implications for the Brexit negotiations and how these in turn will impact us here in the UK

Speaker Biography

Trevor Williams is the former chief economist of Lloyds Bank, a position he held for over 15 years. He has worked as an economist in the city of London for 30 years, and formerly worked in the government economic service. His extensive experience covers financial markets, econometric modelling, the UK and global economy, including issues such as global trade, demographics, productivity, the third industrial revolution and the future of the global economy, of manufacturing & industry etc.

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Closing Seminar

Date & Time: Friday 18th September 12:30 – 13:00

Speaker: Sian Fisher, CEO, Chartered Insurance Institute

We would like to invite members to our closing webinar relating to our 'A Changing World' theme.

We will hear from Sian Fisher, CEO of the Chartered Insurance Institute. Sian will explain how the Institute has adapted during lockdown, what areas have been most impacted by Covid and what the future may look like for the delivery of CII qualifications.

There will also be time for Q&A.

[BOOK HERE](#)





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During 2020/2021, we are raising money via various Institute events for [The Insurance Charities](#) and the President's Chosen charity [Touchstone](#).

Your contribution goes a long way!
Please donate via the link below.



<https://uk.virginmoneygiving.com/IILPresident>