

intouch Liverpool

Your guide to local career development support

Summer 2017



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The Insurance Institute of Liverpool

The Insurance Institute of
Liverpool



PFS



CII



THE
INSURANCE
INSTITUTE
OF
LIVERPOOL
FOUNDED 1807

Welcome

1,636
members

706
members work in
financial services

over 30
hours of face-to-face
CPD in 2017

Part of the Chartered Insurance Institute (CII), the Insurance Institute of Liverpool provides a range of services and support for CII and Personal Finance Society members in the local area, including events with Financial Liverpool.

We are a dedicated group of industry professionals, who volunteer our time to support members, week in, week out, in the local area, in the local market, CPD events, training, networking opportunities and social gatherings. Everything you need to establish yourself within your local insurance community and beyond. Most of these services are free, so read on to find out more...

Your New President

I am delighted and honoured to have been asked to become President of the Insurance Institute of Liverpool 2017/2018. I am proud to be able to further develop and build on the long, distinguished history of our institute during my year of office. I will be supported during this time by my Deputy President, Carly Dunningham, who will be working closely with me throughout the year.

Since the founding of our institute in 1907, we have evolved through many developments across a profession that is constantly changing and where today, again, technology is shaping what we do, how we work and what we insure! To help respond to the challenges presented as professionals, I am looking forward to planning and delivering an exciting programme of continued professional development (CPD) masterclasses, lectures and social events for members which will be advertised shortly.

I have two key objectives for my period of office:

1. To promote the CII and the world of insurance and financial services to young people, they are our future and I am looking forward to hosting our careers event this July.
2. To develop closer links with BIBA (British Insurance Brokers Association) and CISI (Chartered Institute of Securities and Investments) looking to share and co-host events as well as building relationships across our Liverpool associations.

The charity I have chosen to support this year is the North West Air Ambulance. I am also committed to raising awareness of the valuable support and services available from The Insurance Charities.

Finally, I would like to thank my sponsors and supporters: RSA, Griffiths & Armour, Blankstone Sington Limited, Pavis Financial Management and QM Legal Costs. In addition, thank you to RSA, my employer, who are supporting me giving me the time to undertake this role.

Tracey Fisher MBE ACII Chartered Insurer
tracey.fisher@uk.rsagroup.com



Meet the Council

All members are welcome to join the council and get involved in organising events and projects to support the local members, including the Financial Liverpool committee. Here's a quick look at some of the characters, you might bump into at our events...



Phil Beattie BA (Hons) ACII Chartered Insurer

After graduating from John Moore's University, Phil joined Direct Line Group starting as a commercial claims handler, and is now a technical consultant. Phil feels that a lot of the fundamental insurance knowledge came through studying with the CII towards his Advanced Diploma in Insurance. Phil has been on CII's New Generation programme, involved in publishing a report into the insurance implications of fracking.



Emma Lynch LLB (Hons) LLM ACII

Following a swift u-turn in her career plans, Emma works as a PI insurance broker at Griffiths & Armour, after studying law at the University of Liverpool. Emma now travels the UK and Ireland to advise construction clients on risk and insurance issues. She is co-chair of the Syllabus/CPD Committee and responsible for the institute's social media, as well as being a CII coursework marker. Emma will be travelling to India this year to volunteer at an elephant sanctuary.



Shannah Cunningham BSc (Hons) ACII

After studying mathematics in Leeds, Shannah joined Griffiths & Armour's graduate scheme, with placements in both the general and professional indemnity (PI) departments. Shannah has been in PI since and advises construction clients on their professional risks and offers risk management advice. Her biggest achievement was completing the Liverpool Rock 'n' Roll marathon in 2014 – an achievement she does not intend to repeat!

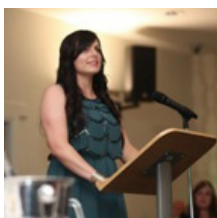


Ken Turner FCII

Ken is now retired having previously worked in various locations for the Royal, TSB Trust Co and Royal Liver, role organising IT systems. Ken was President some years ago and is now a Vice President for Life, as well as having served on various CII national committees. You may recognise Ken from when he played the trumpet at the Grand National 2013 – watched by over 80 million people worldwide!

Regional Council

The Chartered Insurance Institute (CII) was granted its Royal Charter in 1912, but long before this volunteer ‘local institutes’ had been gathering for meetings across the North of England. Ever since, the volunteer local institutes have been working with the CII to further the profession. Nowadays, the CII board meets three times a year with a group of volunteer regional representatives to discuss issues in the profession, maintaining the link between local and national activity.



Sandra McDonald (BA Hons) Cert CII

Sandra works for the CII as a Regional Membership Manager liaising with 13 local institutes across the North of England, including Liverpool to ensure members receive high quality local CPD and networking events. Originally from Liverpool, Sandra comes over from her Saddleworth home to guide our educational programmes and help new projects get up and running, ultimately raising the profile of the CII and the insurance profession.

58

Local institutes
across the UK

First local
institute met in

1873

Straight to the Point

A more
efficient way
of meeting
people



Networking can be hard work. Especially if you spend most of an event stuck talking to someone you know there is no reason to develop a relationship with. So how about a more efficient way of meeting people?

In May we did exactly this with speed networking. Attendees were from a range of roles across the professions including general insurance, financial services and legal, all of which commented on how refreshing the event was, compared to normal networking. Having less than five minutes to talk to each person, before being moved on to the next person, meant that attendees quickly explained their roles and figured out if they could develop a useful connection. Everyone was encouraged

to follow up connections as they would usually – with many staying on to continue talking together after the event finished.

Our President, Tracey Fisher, explained where the idea came from, *“I had heard about speed networking and was sceptical until I went to an event with a lot of CEOs; I realised that, with them often being starved of time, the majority of them had perfected how to network with many people in a short space of time – they were doing their own speed networking! It’s been great to see our members getting to know new people from the profession in a relaxed atmosphere and I hope we can run the event again.”*

Did You Get the Email?

We intend to keep you informed of all our forthcoming events via email. As with a growing number of organisations, email is our main method of communication. It is timely, highly cost-effective and also helps to reduce our carbon footprint.

You can check and update your details online at www.cii.co.uk/MyCII or email customer.serv@cii.co.uk or call +44 (0)20 8989 8464 with your CII PIN.

“Insurance has given me everything”

“I have gained so much from my membership”

Getting to know Dominic Murphy, former institute President and Regional Claims Manager (North West) for Arthur J Gallagher...

Best/worst subjects at school? History is my best and languages the worst. Why is a table feminine? Could never understand it!

Biggest fear? It’s got to be spiders totally irrational but they are creepy! People say you are much bigger than them yet they run directly at you!

Spare time? Football – five aside and going to the gym a few hours a week. With two small children it’s hard but I have to make time. I have a season ticket Anfield and take my sons to the game. One loves it the other doesn’t, I don’t force them.

Best bar and or best restaurant? At the moment – Leaf Tea, Cheese and Co and Moghali in Bold Street. The Indian street food/Indian tapas is fantastic. There are so many in Liverpool at the moment it is great to see. Especially where Liverpool was a decade ago before the regeneration. There is something that caters for all tastes.

Favourite film? Any Bond – probably Casino Royale or Skyfall. Daniel Craig has got to be the best Bond, followed by Pierce Brosnan. But my best friend argues that it’s Roger Moore because he can tell a whole story with one eyebrow!

Rock, soul, classical, jazz... Rock, and the best group is Oasis.

Top five desert island discs? Rock and Roll Star Oasis. Any Oasis. Would depend on my mood.

Essential item for holiday? Sun lotion is a must because I am a ‘ginge’ and never tan. I am white or red and that’s it.



Weirdest thing that has ever happened to you? Being on Songs of Praise. I went to Lourdes and was interviewed for Songs of Praise to speak to kids about my religious experience. I was famous for two minutes!

Who would you like to have lunch with? Donald Trump. I genuinely don’t understand him and it would be interesting to try to.

Last May you took on your current role as North West Regional Representative to feed into the main CII board, what have you learnt so far? There are a great many opportunities in insurance overall and also in the CII itself, more than everyone realises and appreciates. I have gained so much from my membership in terms of my personal and professional development. It really all culminated in my year as president where I felt I was able to put much back into the institute and I am proud that during my year I raised a record £10,000 for my chosen charity, Nugent Care. I like to think I have continued to actively support my local institute. Should anyone be interested or thinking of joining the CII, I would very much encourage them to do so and throw themselves into it!

“Like so much in life, you get from it what you put in”

Young Achiever of the Year 2016

Congratulations to Bethany Lavin from Aviva

"I was so shocked to have won the award! 2016 had been a really challenging and hectic year with finishing my Apprenticeship Programme, completing my Diploma in Insurance and going on secondment to Perth, Scotland to do a completely different role in the IT world. For me, the award is important as I didn't go to university. Instead, I joined Aviva under what was their new Apprenticeship Programme in 2012. I always wondered if my decision not to go to university would hold me back, but this award proves I made the right choice!"



Bethany proudly accepted her award at the Annual Dinner in January 2017.

CII Service Awards

We are thrilled to announce that Liverpool now not only has two cathedrals, but also this year has two institute council members who have won CII Service Awards:



Marie McAnaulty from Griffiths & Armour
CII Distinguished Service Award

Andrew Parkhurst ACII Chartered Insurance Risk Manager
CII Exceptional Service Award

Everyone involved on the local council is delighted that Marie and Andrew, both popular figures, have had all their many hours of hard work and dedication formally recognised by the CII and share with them a certain pride. The awards will be presented by the CII President at the Network Conference 2017 evening reception in Manchester on Thursday 29 June 2017.

Marie would like to thank all those involved, *"I would like to express my sincere thanks to my fellow Council members for nominating me for this award I am extremely humbled and honoured by your recognition of my time and effort over the years. I also feel a bit of a fraud accepting this honour as I have always enjoyed being part of the Insurance Institute of Liverpool and never considered this as a duty and that is solely due to the comradery I have enjoyed with all the Council members over the years."* Andrew was away and so unavailable for comment at the time of publication.



Learning From Mistakes Masterclass

Mistakes in organisations waste time, cost money and annoy customers. The time it takes to make, find and correct errors can typically cost 18-20% of a salary bill, according to Hugh Murray, and that's before the cost of the errors themselves are considered.

Hugh Murray is a Director of Scott Bradbury Ltd and we have invited him to present, coach and train members at a masterclass on how we can all learn from mistakes – and save our companies time, resource and money!

Date: Wednesday 27th September 2017.

Time: Registration from 8.30am for a 9am start. To finish for 12.30pm.

Venue: Aloft, 1 North John Street, Liverpool.

Booking: Online at www.cii.co.uk/liverpool

The morning will include using an example of a reinsurance company who paid out £70 million instead of £7 million because the decimal point was in the wrong place! Although the money was eventually returned it had been paid out in Brazilian Reals. There was a significant loss due to currency exchange rate fluctuations – not to mention loss of face! By learning how we can reduce errors, money can be saved, productivity boosted and efficiency increased.

“it’s not these huge mistakes which waste the most money; it’s the everyday ‘small’ errors, which mount up and become a huge drain on resources”

The course will cover the following content:

- Reviewing mistakes that have actually happened
- The importance of learning from ‘near misses’
- Understanding why mistakes happen
- Where to focus attention to achieve the biggest ‘wins’
- The danger of accepting mistakes as ‘one of those things’.

It’s all about getting it right first time, every time

Paid out £70 million instead of £7 million!

The masterclass will help members learn why mistakes happen and how we can all develop practical, effective accuracy skills to enable us to read, check and transfer information correctly. During the course, we will find out why our reading skills can work against us when it comes to working with data and we will experience working at the optimum speed for accuracy – which will probably be faster than we think! There will even be a light-hearted ‘insurance data’ test, to help us measure our own accuracy rate.

By the end of the masterclass, delegates will be able to identify:

- Why all human beings make mistakes
- How we can demonstrate practical techniques for reading, checking and transferring data accurately
- How we calculate the ‘back-of-envelope’ cost of data error in organisations
- How we can describe and apply the ‘three Cs’ of accuracy
- How to ditch our ‘reading’ skills in favour of ‘accuracy’ skills when we work with data.

Speaker Biography



Hugh Murray founded specialist training publisher Fenman in the 1980s, launched the UK’s first ever online community for HR and L&D

professionals (UK-HRD), published the Training Journal magazine until 2002 and is well-known in the industry for his acclaimed work as a video script-writer and presenter.



3 hours’ CPD can be claimed for this event if relevant to your learning and development needs.

This demonstrates the quality of an event and that it meets CII member CPD scheme requirements.

Improving Mental Wellbeing

Taking care of our mental health is just as important as taking care of our physical health



Mental Health Awareness Week took place in early May, an initiative fully supported by the local institute and the CII. Tracy O’Connell, part of the CII Diversity, Equality and Inclusion Committee, provides an insight into improving your wellbeing.

Mental wellbeing describes our mental state – it’s about the way we think, how we are feeling and how well we can cope with day to day life. Our mental wellbeing can change, from day to day, month to month or year to year.

Life can be stressful; sometimes we have to deal with ongoing stress positively. Stress can have a variety of causes such as family problems, job problems, financial difficulties, poor health, or even the death of someone close to you.

It is important to recognise the causes (some stress is natural), and take steps to deal with the root of the problem, tackle the symptoms and importantly, don’t battle stress alone – ask for help from a friend and, if necessary, a professional.

It is important to remember that there are no quick cures for stress, some people keep a diary and make a note of their stress triggers, others try breathing and relaxation exercises. Here are a few suggestions, but no single method will work for everyone.



Top Tips to Reduce Stress

BE ACTIVE

Physical activity can get us in the right state of mind to think more clearly and calmly, reducing some of the emotional intensity we are feeling.

DEVELOP A HEALTHY LIFESTYLE

Eating at regular mealtimes with plenty of water and vegetables.

AVOID UNHEALTHY HABITS

Don't rely on smoking, alcohol, caffeine or junk food as a way of coping.

HAVE A GOOD NIGHT'S SLEEP

We are more likely to become negative, irritable and less confident with a lack of sleep.

CONNECT WITH PEOPLE

Having friends for support and to talk to, having a good laugh with them is a good stress reliever. Spending time with positive and supportive people can help to improve our self-confidence.

HELP OTHERS

Sometimes helping others can put our own problems into perspective. The more we give the more resilient and happier we feel.

TELL SOMEONE YOU KNOW AND TRUST

They may be able to offer practical help and advice, but even if they can't, talking things through with someone can make us feel much better.

ME TIME

Set time aside each week, away from work to take quality time for yourself.

CHALLENGE YOURSELF

Continue to keep learning, it will build your confidence.

TAKE CONTROL

Of your problem, it is empowering and it is important to find a solution to suit you and not someone else.

WORK SMARTER, NOT HARDER

Prioritise work concentrating on the tasks which will make a difference. Accept the fact that the in tray won't be empty at the end of the day.

BE POSITIVE

At the end of the day write three things that went well during the day.



AVOID NEGATIVE TRIGGERS

Being aware of things that we know will have a negative impact on our mood: it could be a certain food, a person or the time of year.

ACCEPT WHAT WE CANNOT CHANGE

Try to concentrate on the things we do have control over.

TAKE TIME TO RELAX

Even if it is just a few minutes to look out of the window!

Forthcoming Events

Date/Time	Event	Speaker	Venue
Wed 5th July 9.30am	Insurance and Financial Services Careers Event	Various	Crowne Plaza, Princes Dock
Tues 11th July 12pm	Road casualties – what can be done to reduce them in Merseyside?	Sgt Paul Mountford	Racquet Club
Sat 15th July 12pm-4pm	Family Day – Royden Park Miniature Railway	NWAA Fund Raising Event	Royden Park, Frankby, Wirral
Tues 12th Sept 12pm	Regulatory Developments: The New Sentencing Guidelines Start to Bite	Richard Salvini, Triton Global	Racquet Club
Wed 27th Sept 8.30am	Learning from mistakes	Hugh Murray, Bradbury Scott Ltd	Aloft
Fri 29th Sept 12.30pm	Financial Liverpool: CPD Presentation	Momentum	Tilney BestInvest Offices
Tues 10th Oct 12pm	Cyber Crime and Security	Alastair Murray, The Bureau	Racquet Club
Fri 13th Oct	Annual Lunch & Prizegiving	Neil Gyllenship	Malmaison
Fri 27th Oct	Pensions Update	Barnett Waddingham	Tilney BestInvest Offices
Tues 14th Nov 8am	Different professions, different perspectives	Dave Westall, Delta-Omega	Tilney BestInvest Offices

For further details and bookings visit: www.cii.co.uk/liverpool

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