



Chartered  
Insurance  
Institute

CII Broker  
**Assess**

# Elevate performance

Learning powered by professional expertise.

[www.cii.co.uk/assess](http://www.cii.co.uk/assess)



# Take your organisation's training and development to the next level

BrokerAssess is a powerful LMS, built by insurance experts to support learning, compliance and continuous professional development. Using video, interactive scenarios and case-based learning, the platform tracks progress and inspires users to stay motivated and engaged.

BrokerAssess learning content and associated assessments cover all aspects of insurance, from underwriting, broking and claims, to customer service, business support, workplace skills and mental health and wellbeing.

Get in touch to register for a 14-day free trial, attend an online demo or request a Content Guide at [www.cii.co.uk/assess](http://www.cii.co.uk/assess)



## Courses

For new employees or experienced professionals, there are training courses for brokers, underwriters, claims specialists and all staff across your business.

## Content

With over 1,000 courses and 10,000 assessment questions, BrokerAssess covers the basic principles of insurance and regulation up to the more technical details of general insurance. Content is divided into a range of intuitive catalogues, each of which focuses on a key aspect of the profession.

## Analytics

Analytics reports are delivered direct to your desktop, tablet or mobile to support training and competency requirements. BrokerAssess automatically records activity to help you build reports and evidence training and competency activities across your business.

## Governance, Risk and Compliance

Get the right training your organisation needs to keep up with regulations and compliance, including specific FCA Core CPD content.

## Diagnostics and Testing

Includes diagnostics, gap analysis, assessments, and recruitment tests – with thousands of questions, to help meet all your industry and compliance requirements. Our CPD tool will help you plan and record your activity.

## Learning Management System (LMS)

Complete control over training and development, with features to help you manage training, schedule activities and monitor staff development.

# Courses

BrokerAssess has over 800 technical courses for your business, from personal and commercial lines to the complexities of London Market products and Insurance Specialisms.

## Onboarding

The introduction to Insurance catalogue provides new members of staff with a solid foundation and understanding of key insurance terms and how insurance works. We also have our Foundations of General Insurance for a more in-depth understanding of insurance.

## Broking

Designed by brokers for brokers, there are over 75 individual broking courses to support all the product areas, plus an extensive broking operations section on the fundamentals of broking.

## Claims

BrokerAssess contains over 80 Claims specific courses. Claims Handling, Fraud, Litigation and Loss Adjusting courses build knowledge and understanding for claims specialists and support staff.

## Underwriting

BrokerAssess contains over 80 Underwriting specific courses, where every product covered has a specific Underwriting course. In addition, there is an underwriting section covering areas such as policy construction, pricing, delegated authority, subjectivities, conditions, precedents, warranties and much more.

## Making it Personal

Create and build your own e-learning courses, or top and tail BrokerAssess courses so they're personalised for your business. You can use the inbuilt authoring tool, or upload SCORM, video and PDF content.

## Business Skills

Help your staff build business skills and knowledge with a wide range of short courses from Project Management to Personal Development, HR, Health and Safety, Mental Health and Wellbeing, Leadership and Management.

## Courses

Use pre-built learning courses or create bespoke learning courses to build knowledge and understanding across individuals and teams.

## Continuing Professional Development (CPD)

The inbuilt CPD tool automatically records completed activities on the system and allows users to record their non-BrokerAssess CPD activities – so all records are in one place.

## Insurance Specialisms

Choose from over 70 courses on a broad range of specialist insurance products, including Aviation and Space, Marine, Political Risks, Energy Risks and Bloodstock.

# Governance, Risk and Compliance

BrokerAssess courses are aimed at all levels in your business, right up to the board.

With over 340 regulatory specific courses and videos available to choose from, you can be assured BrokerAssess has it covered.

Staying fresh with regulation has never been more critical. From FCA Core CPD to the Senior Managers & Certification Regime, BrokerAssess builds and checks knowledge across your organisation to stay ahead of regulatory demands.

## FCA Core CPD (IDD)

The FCA requires organisations that are distributing insurance products, or are involved in their distribution, to complete sufficient CPD to maintain appropriate levels of knowledge and competence. Firms are responsible for ensuring that their employees continue to maintain these levels.

Our FCA Core CPD catalogues in BrokerAssess include content appropriate for many employees to support this. The content in these catalogues can be easily supplemented with our other technical content from the hundreds of courses available. All activity completed on BrokerAssess is automatically captured as CPD.

## Senior Managers Regime

As well as An Introduction to the Senior Managers and Certification Regime, we have courses on Senior Managers Arrangements, Systems and Controls, Senior Managers Regime and Certification Regime to ensure you're always up to date on SM&CR.

## Financial Crime

Our Anti-Money Laundering and Countering Terrorist Financing for Financial Service, Bribery and Corruption for Financial Service, Fighting Fraud for Financial Service, and Customer Due Diligence courses address the more common areas of regulation.

## Conduct

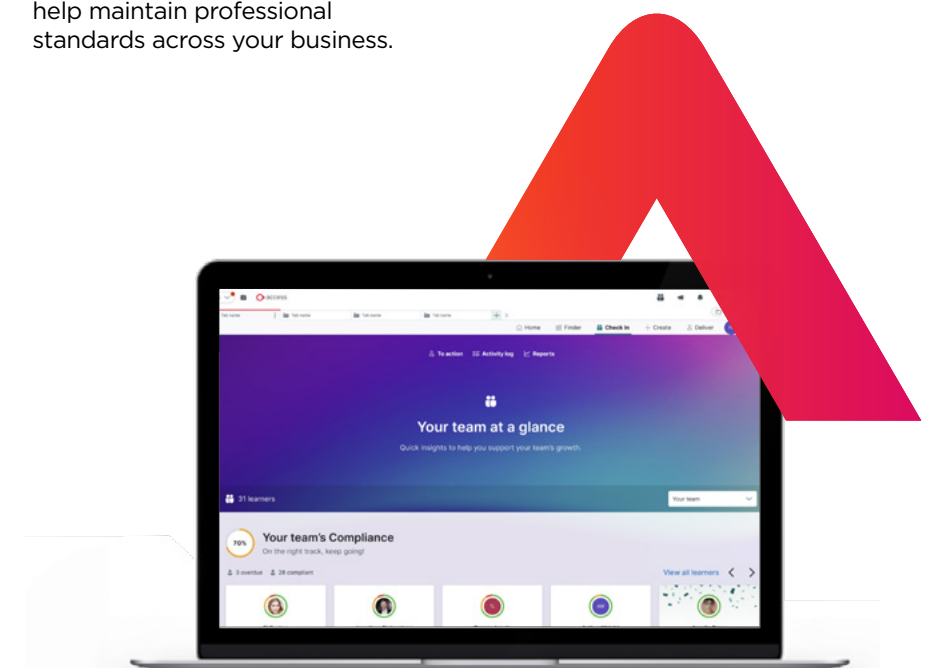
Courses on Conduct Rules, Conflicts of Interest, Whistleblowing, Understanding Vulnerable Customers and Consumer Duty help maintain professional standards across your business.

## AI, GDPR and Sustainability

We're constantly adding to and updating our content to keep you ahead of the curve in these critical topics.

## Non-Financial Misconduct (NFM)

BrokerAssess has many courses that cover all aspects of NFM.



# Diagnostics and Testing

Diagnostics, gap analysis and assessments – with over 10,000 questions, help meet all your insurance and compliance requirements.

## Managing Risk Within Your Business

The integrated diagnostic tool enables you to understand knowledge levels across your business in real time. Using a diagnostic approach lets you test on a broad set of knowledge areas, giving you critical insight into where learning needs to be focused. This approach ensures that staff only need to complete learning where they need to, which in turn, saves you time and takes into account an individual's existing knowledge and understanding.

## Gap Analysis

The diagnostic tool measures a user's knowledge against required competencies for their role. Training courses are then automatically created for each user to help you manage and maintain knowledge across a wide area.

## Micro Assessments

To help staff maintain regulatory and technical training each year, the diagnostic functionality supports micro assessments so you can explore many competency areas in one sitting.

## Standard Assessments

For standard assessments, simply choose the course, the number of questions and the pass mark, for an assessment to be randomly created from an up-to-date question bank.

# Analytics

Good quality reporting drives performance and success. Training activities are automatically recorded to build data reports so you can easily evidence training and competencies across your business.

## Flexible Reporting

You can build your own reports or select from a host of pre-built reports and easily view assessment attempts, course completions, test scores and results, or activities yet to be completed.

## Dashboards

Detailed dashboards bring your training data to life, providing you with a clear view of user activities, completions and scores across teams and departments.

## Robo Reporting

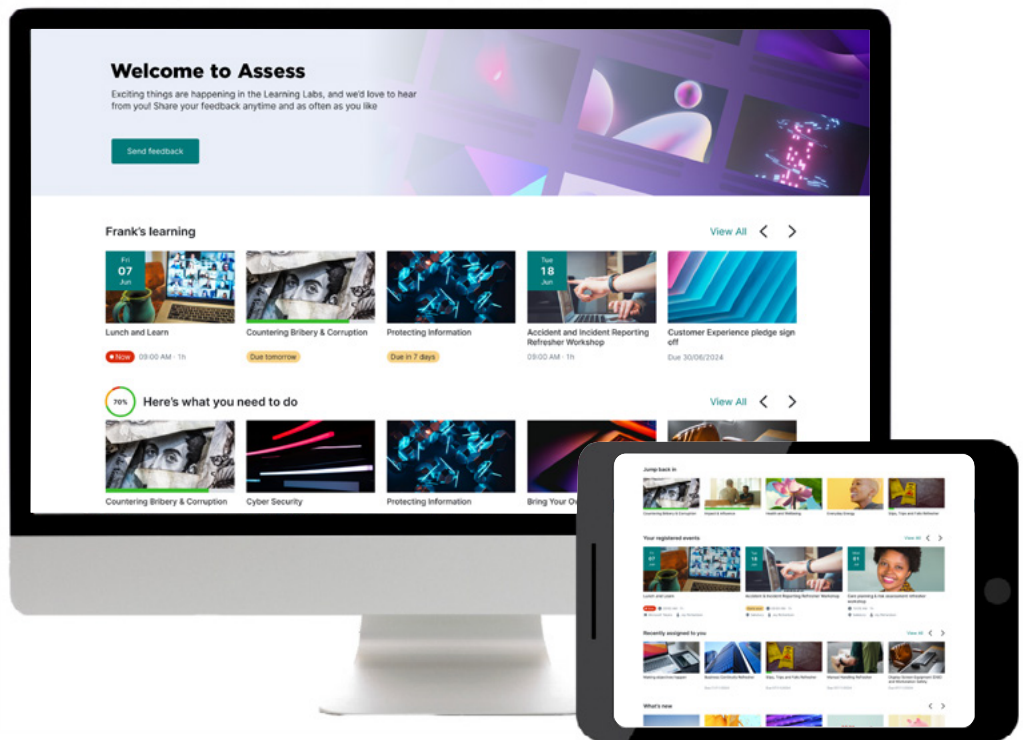
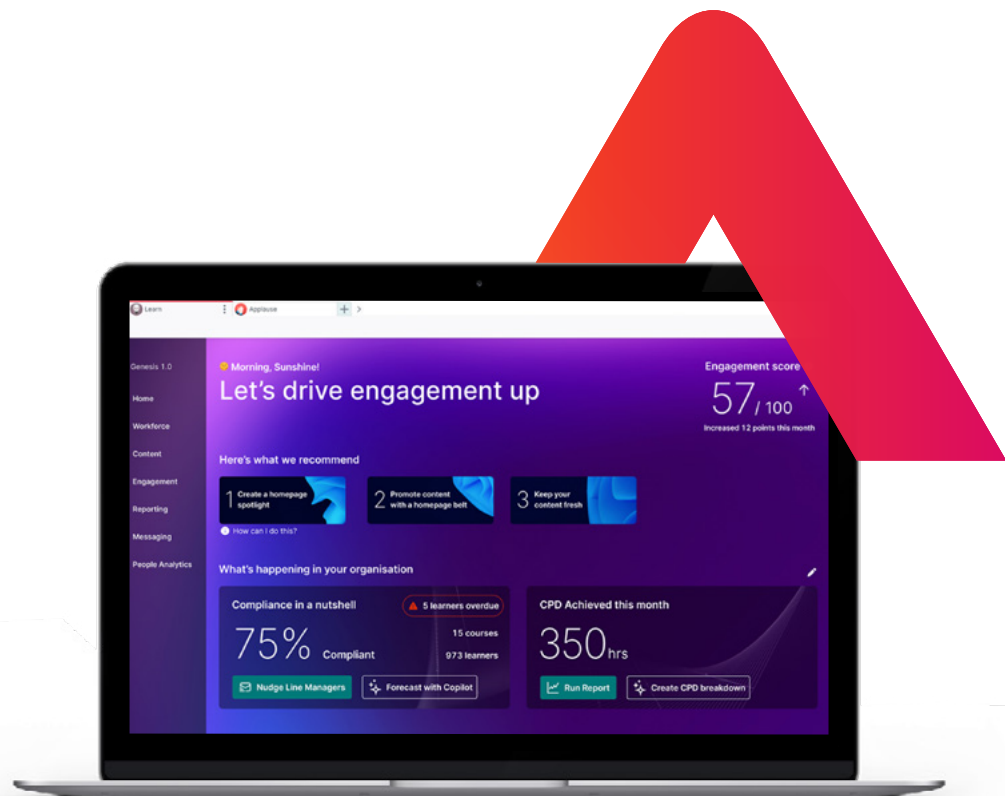
Set up the automatic delivery of reports so they arrive when you need them.

## CPD Reports

Users can complete development needs and reflective statements online. BrokerAssess automatically records each activity to help maintain CPD records and run reports. Users can also add offline CPD events to BrokerAssess and CII members can link their BrokerAssess record to their CII CPD record and maintain their activity in one place.

## The Manager's View

Managers have access to their direct reports' progress on all allocated BrokerAssess activities by viewing the manager's dashboard from their homepage. This is a key way to ensure that learning courses are completed.



# Content

BrokerAssess helps raise professional capability with intuitive learning catalogues focused on the key disciplines of the profession. Discover the specialist areas covered.

## FCA Core CPD

BrokerAssess houses pre-built courses aimed at all staff distributing insurance products, or are involved in their distribution. These help demonstrate minimum levels of knowledge in specific core areas highlighted by the regulator. In addition, there are over 400 role-specific technical training modules to demonstrate product competency.

## Introduction to Insurance

This catalogue houses a collection of courses aimed at new starters to insurance and makes an ideal onboarding solution. These 12 short courses are supported by multiple choice questions covering the basic principles of insurance like proximate cause, insurable interest, contribution, subrogation and much more.

## Introduction to the London Market

This catalogue covers everything from the origins of the market, its structures and associations, the processes of delegated authority and binding agreements to regulations and legal requirements. It offers a comprehensive solution to support onboarding programmes.

## Foundations of General Insurance

These courses are more in depth than the introduction to insurance courses and cover Broking, Underwriting and Claims in detail. Over 45 courses provide over 45 hours of learning and over 900 questions.

## Governance, Risk and Compliance for Financial Services

Developed with insurance experts, this catalogue is designed to help your business develop a compliant culture and face governance, risk and compliance challenges. Topics include Financial Crime, Conduct, Data Security, SM&CR, FCA Core CPD and General Insurance Regulation.

## Health and Protection

This catalogue covers all the key information on insurance products that will prove useful for all those working in the profession. Topics covered include Critical Illness, Income Protection, Business Insurance Protection, Mortgage Protection, Long-Term Care, Private Medical, Health Cash Plans, Dental Plans and Group Life and Health Insurance. With over 60 courses and over 850 questions, this is a very comprehensive look at Health and Protection products.

## Personal Lines

From Home, Private Motor, High Net Worth, Pets, Horses and Ponies, Travel, Leisure and Events and much more, this catalogue covers consumer insurance products in depth. These courses look at products from a policy cover, underwriting, broking and claims perspectives along with an overview to the topic as a whole.

## Commercial Lines

The comprehensive BrokerAssess Commercial Lines catalogue houses over 160 courses and over 2,500 questions relating to Commercial Property, Commercial Motor, Commercial Liability, Contractors' All Risks, Farming and Agriculture, Commercial Legal Expenses, Business Travel and Health and Safety.

## Insurance Specialisms

Courses include Cyber Risks, Marine, Aviation and Space, Pollution and Environmental Risks, Energy Risks, Bloodstock, Political Risks and Jewellers' Block, Fine Art and Specie.

## Content Guide

The online content guide details every module with the number of assessment questions and the relevant CPD time.

## Workplace skills

These short courses cover Communication and Social Skills, Leadership and Management, Personal Development, Teamwork and Customer Experience.

## CII Qualifications Revision

We have included our E-learn revision content for our qualification units: FIT, IF1, IF2, IF3, IF4, IF5, IF6, IF7, and IF8.

## Mental Health and Wellbeing

Over 40 courses covering topics from Mental Health Awareness, Building Resilience, Wellbeing, Managing Emotions and Better Decision Making.

## Health and Safety

Over 90 courses for all businesses to maintain compliance with the law and to protect the workforce.



# Learning Management System (LMS)

BrokerAssess gives your organisation access to your own LMS. The powerful platform is packed with features to help you allocate, manage, record and report on all the learning completed on the system. You can also record CPD, schedule activities and monitor staff activity.

## Easy Online Access

BrokerAssess is an online training and competency solution enabling easy access 24/7. Everyone with a licence can log into the system via a PC, tablet or mobile phone. There is no installation required, just login to start training – it's so easy.

## Customisation and Personalisation

You can customise the standard BrokerAssess site to include your own company logo or create a bespoke site for your business. The inbuilt authoring tool allows you to build e-learning activities and training to suit your requirements.

## Easy Admin

BrokerAssess is automated to simplify administration. For example, you can arrange your reports to be sent to you automatically at a set time or day.

## Manager Controls

Managers can easily monitor training activity across their teams and view staff progression on the 'manager view' dashboard. With managers involved in the training management process you can maximise all the benefits of BrokerAssess for your business.

## Set Up

If you have a sizeable company with several locations, departments, or teams, it is easy to replicate that hierarchical structure on BrokerAssess.

You can create learning courses and allocate to specific groups to meet their learning and development needs. You can report on an individual's progress or look at specific departments or teams to see if there are any learning areas that need to be addressed.

Developed by leading professionals, BrokerAssess is a powerful LMS delivering expert-led learning content to encourage compliance and continuous professional development throughout your organisation.

For more information on how BrokerAssess can benefit your business, contact [business.enquiries@cii.co.uk](mailto:business.enquiries@cii.co.uk)

Get in touch to register for a 14-day free trial, attend an online demo or request a Content Guide at [www.cii.co.uk/assess](http://www.cii.co.uk/assess)





**Get in touch to register  
for a 14-day free trial, attend  
an online demo or request  
a Content Guide at  
[www.cii.co.uk/assess](http://www.cii.co.uk/assess)**

Email [business.enquiries@cii.co.uk](mailto:business.enquiries@cii.co.uk)

 Chartered Insurance Institute

 @CIIGroup

Chartered Insurance Institute  
1st Floor, 30 Old Broad Street  
London, EC2N 1HT

© The Chartered Insurance Institute 2026  
All rights reserved.

