Data and Technology (Personal Finance)

Chartered Insurance Institute

Standards. Professionalism. Trust.

Learning resources
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Contents

About Data and Technology

Understands and utilises the benefits of existing and emerging technologies and makes effective use of data and insights to support decisions.

Learning by bands

This section outlines the Data and Technology competency standards for each of the four professional bands, together with links to relevant CPD learning, qualification units and other learning to help you prioritise and access your skills development.

The bands

The Professional Map is structured into 4 bands of experience, each describing the different level of impact professionals have in the work they do.

	Band 1	Band 2	Band 3	Band 4
Typical job roles	Front line staff, administrative and entry level roles	First line managers, team leaders, regulated and specialist roles	Middle managers, and senior technical roles	Senior leaders and business owners
Nature of work	Tactical, focusing on the day to day	Operational, with some complexity	Complex, with challenging requirements	Strategic, with a significant level of complexity and challenge
Sphere of influence	Line manager, immediate colleagues and customers/clients	Managers, colleagues, customers/ clients and external professionals	Wider range of stakeholders, both internal and external	Senior stakeholders from across the profession, customers, suppliers and regulators
Focus of activity	Deliver immediate and short-term outcomes	Directly create short-term value, contribute to longer-term value	Create medium to long-term value	Create long-term value
Focus of thinking	Gather and use information	Contribute to the thinking and analysis of information	Critically question information and evaluate it to make informed judgements and decisions	Develop evidence-based thinking, using qualitative and quantitive data to shape the future activity
Focus of knowledge	Knowledge of the principles of personal finance	Broad understanding of personal finance practice	Deeper understanding of the concepts of personal finance, with specialism in a functional area	Deep technical knowledge in an area, or an excellent understanding of the broader environment
Where time is spent	Customer/client services, providing information, handling data, following procedures	Issue identification, analysis and evaluation, proposal and delivery of solutions to agreed standards, and within agreed limits	Understanding the wider business context and risk, bringing strands of activity together, innovating	Developing strategies and plans, making complex judgements, considering the organisation and sector position
Breadth of focus	Team	Department	Area or responsibility/Organisation	Organisation/Profession/Wider society

Band 1

Competency standards

- I understand and can use the technology tools required for my role
- I am open to changing the way I work in the light of new technologies
- I use appropriate digital and non digital data in my work
- I use technology to effectively communicate with others
- I understand how to use social media at work and the risks associated with it

Band 1 learning resources

Member CPD	Assess corporate e-learning*	Training and courses	Qualification units
2021 – The year adviser technology leaves the back office LinkedIn Workshops – Part 1 Our Relationship with Technology		EDII – Digital Minds For more details on CII Training, please visit our website: www.cii.co.uk/learning/training/	

*Content held on the Assess platform is available to those with a corporate licence. Click on the links to find out more about the features and benefits of a corporate Assess licence or request a free trial.

Band 2

Competency standards

- I understand and utilise the technology that is available in my organisation
- I keep up to date with new and emerging technologies and apply them in my work whilst being aware of their risks
- I make suggestions as to how technology can be used to improve processes
- I analyse and evaluate data and insights using appropriate technologies
- I apply technologies to present information

Band 2 learning resources

Member CPD	Assess corporate e-learning[*]	Training and courses	Qualification units
		EDII – Digital Minds For more details on CII Training, please visit our website: www.cii.co.uk/learning/training/	

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Band 3

Competency standards

- I use technology to support the delivery of best practice and deliver optimal customer outcomes
- I use developments in technology and the use of data and insights to add value to my functional area
- I embrace developments in working practices and technology and adopt them in my day to day activities
- I use data and technology to improve the efficiency and effectiveness of processes and drive operational change
- I make evidence based and data driven decisions

Band 3 learning resources

Member CPD	Assess corporate e-learning[*]	Training and courses	Qualification units
		Dive In Festival	
		EDII – Digital Minds	
		For more details on CII Training, please visit our website: www.cii.co.uk/learning/training/	

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Band 4

Competency standards

- I ensure that processes exist within the organisation to ensure the timeliness, accuracy and validity of data and insights
- I ensure that everyone in the organisation is using data, insights and technology effectively to add value
- I drive digital and technological transformation in the organisation
- I investigate and implement emerging technologies to drive business improvement
- I collaborate with others in the profession to find new ways to use technology in my organisation

Band 4 learning resources

Member CPD	Assess corporate e-learning*	Training and courses	Qualification units
Understanding and mitigating the risks of lead generation		Dive In Festival For more details on CII Training, please visit our website: www.cii.co.uk/learning/training/	

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Member CPD

Here you will find links to Member CPD available related to this competency.

Webinar: <u>2021 – The year adviser technology leaves the back office</u>

Webinar: <u>LinkedIn Workshops – Part 1</u>

Webinar: <u>Our Relationship with Technology</u>

Webinar: <u>Understanding and mitigating the risks of lead generation</u>

Training and courses

The diversity of our course programme and breadth of corporate services makes us a one stop-shop training provider. We work in partnership with employers to develop relevant and cost-effective training solutions that are driven by business needs and deliver lasting results.

CII Training

For more details on CII Training, please visit our website:
www.cii.co.uk/learning/training/

CII Accredited third party training

Dive In Festival

EDII – Digital Minds