



Chartered
Insurance
Institute
Standards. Professionalism. Trust.

Marketing & Promotions Guidelines

for Further & Higher Education providers





Welcome

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communication**

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to the public**

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Welcome

We are very happy to be working in partnership with you in developing a future cadre of professionals with the potential for rewarding careers in insurance and personal finance.

We've devised this toolkit to help you promote your institution and its relationship with the Chartered Insurance Institute (CII) and Personal Finance Society (PFS) to your new and current students, business partners, and stakeholders.

The CII's vision is that we achieve 'parity of esteem' with established professions such as medicine and accountancy; through students achieving their academic qualifications in addition to CII professional qualifications on their learning and professional journey.

The kit comprises simple guidance, example assets and ideas on how to promote our partnership. We would very much welcome feedback on what works well and ideas for improvement as we evolve this toolkit to support our shared objectives.

Like you, we exist to serve a societal purpose- in our case to build public trust in insurance and personal finance. We do this by raising standards and helping more professionals to serve the public with expertise, integrity and customer centricity. We sum this up with our strapline: **Standards. Professionalism. Trust.**

Sian Fisher, ACII, Chartered Insurance Practitioner
CEO, Chartered Insurance Institute

About the toolkit

Prospective and current students may not know about the programme(s) your institution is collaborating/partnering with us on or anything about the CII.

We can help you to raise awareness of the insurance and financial planning professions and the CII as a professional body, while raising the profile of your institution and its programme(s) of study.

The aim of the toolkit is to provide you with simple guidance, example assets and ideas on how to promote our partnership to new and current students, business partners and stakeholders.

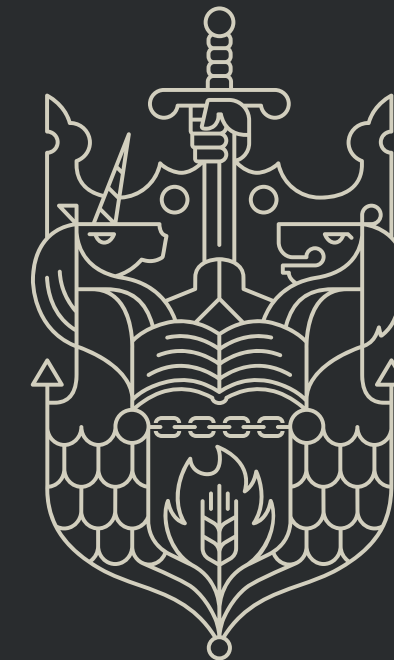


**Chartered
Insurance
Institute**

Standards. Professionalism. Trust.

Chartered Insurance Institute

Professional body comprising more than 125,000 individuals drawn from across the global insurance and personal finance profession.



**Personal
Finance
Society**

Standards. Professionalism. Trust.

Personal Finance Society

Part of the CII Group - the leading professional body for Financial Planning with over 38,000 members.

Internal Communication

The relationship between your institution and the CII will also need to be understood internally.

We suggest an internal communication about our partnership arrangement, the benefits it offers and information about the Chartered Insurance Institute and the Personal Finance Society.

Our partnership will offer value to many of your stakeholders. Raising awareness with internal colleagues will support their conversations with stakeholders and help them to meet their needs.

It is worthwhile providing an indication of timelines, e.g. the Academic period effected; the Departments or Schools concerned, the benefits to students, and your institution within the sector.





External Communication

Looking outside your institution there are great ways to promote the relationship with the CII. For example, a logo demonstrating a programme of study being CII accredited.

The toolkit includes collateral promoting the CII as a professional body and information on the Local Insurance Institutes and Personal Finance Regional Committees which are affiliated. We can provide leaflets, postcards, collateral and logos which may be employed at promotional events such as Careers Fairs, Open Days, Employability Events and tours.

Please use the collateral accessible from us freely to promote your relationship with the CII. Each of the components has its uses in raising awareness and understanding of the meaning and value of being in partnership with CII.

If you have any further suggestions on what we can include within the toolkit, please get in touch.



Promoting the CII to the public

Logos

About the CII

Resources





Logos

You may use these logos in respect of Higher and Further Education under the legal arrangements you have with the CII.

They may be placed on everything from email to corporate web pages, social media, printed brochures and letterheads.

The logos form an important part of distinguishing you from other institutions in the sector.

Guidelines on the use of logos and marks are available and may be obtained by contacting:

 EducationPartnershipCoordinator@cii.co.uk



Chartered
Insurance
Institute

Accredited



Chartered
Insurance
Institute

Aligned





About the CII

Use this statement about the CII in your communications. It's the same for everyone, and it keeps things consistent aiding wider understanding.

“The Chartered Insurance Institute are the professional body dedicated to building public trust in the insurance and financial planning profession. Their strapline Standards. Professionalism. Trust. embodies their commitment to driving confidence in the power of professional standards: competence, integrity and care for the customer.

The CII deliver that commitment through relevant learning, insightful leadership and an engaged membership. Over 125,000 members commit to high professional standards by maintaining continuing professional development and adhering to a published ethical code.

Their Royal Charter requires the CII to secure and justify the confidence of the public”.



Find out more about what they do by reading our 'About the Chartered Insurance Institute guide'

- About us The Chartered Insurance Institute**: Overview of the CII's mission and history.
- What do we do? MEMBERSHIP**: Details on membership benefits and support.
- The New Gen Group**: Information on the initiative to develop future leaders in the profession.
- Insuring Futures**: Details on the program to support women in the industry.
- Who are we?**: Overview of the CII's structure and global reach.
- Local Institutes**: Information on the network of local institutes across the UK.
- Societies**: Details on the various professional societies within the CII.
- Corporates**: Information on the CII's work with corporate clients.
- Qualifications**: Details on the various professional qualifications offered.
- Heritage**: Information on the CII's long history and royal charter.
- Education outreach**: Details on the CII's commitment to education and training.
- Chartered**: Information on the CII's status as a chartered body.
- International**: Details on the CII's global presence and international growth.



Resources

Personally hand out or enclose flyers or postcards in mailings.

Available as PDF for immediate download, or as a printed version. To order contact Education Partnerships at:



EducationPartnershipCoordinator@cii.co.uk

Video content

There is video footage and broadcasts accessible at the CII Youtube Channels “ciimedia” and “ciiradio”.

There are also video case studies of career journeys of working in Insurance and Financial Planning Which are accessible to the general public.



Insurance and Financial Planning
www.ciistepforward.co.uk



Video case studies ▶▶



Sebastian Frost
Graduate Program
Insurance



Lia Konstantopoulou
Shipping Lawyer Marine
Claims



Iveren Yongo
Trainee Cyber
Underwriting Insurance



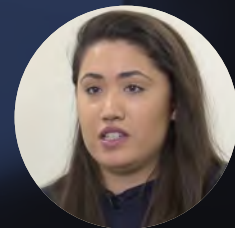
Cem Akdeniz
Claims Executive



George Repard
Corporate Risk Broker



Abby Cronin
Broker



Amaya Vao
Trainee Broker



Rob Lisle
Marketing Project
Manager Ex Royal Navy



Lewis Hooper
Paralegal



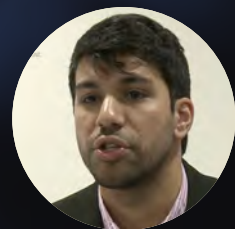
Erik Johnson
Corporate Development
Manager



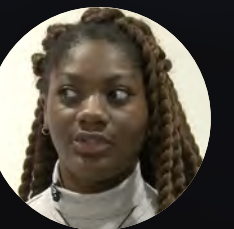
Afsar Ali
Cyber Analyst



Nick Onslow
Chartered Financial
Planner



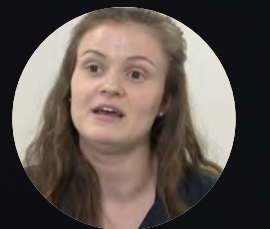
Ajay Granger
Actuary



Fiona Adenis
Apprentice Broker



Martin Shoesmith
Financial Planner



Heather Appleby
Aspire Apprentice
Financial Planning

Hints & Tips

1. Tell prospective students, employees and business partners

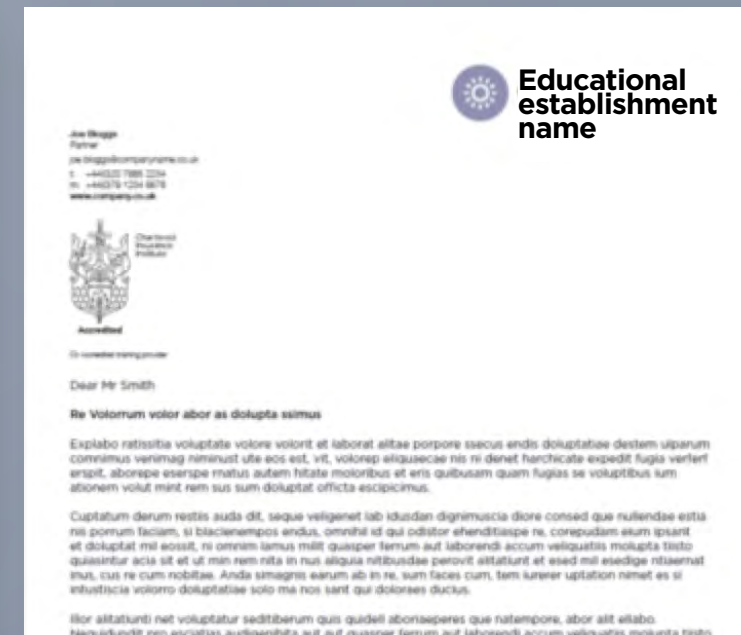
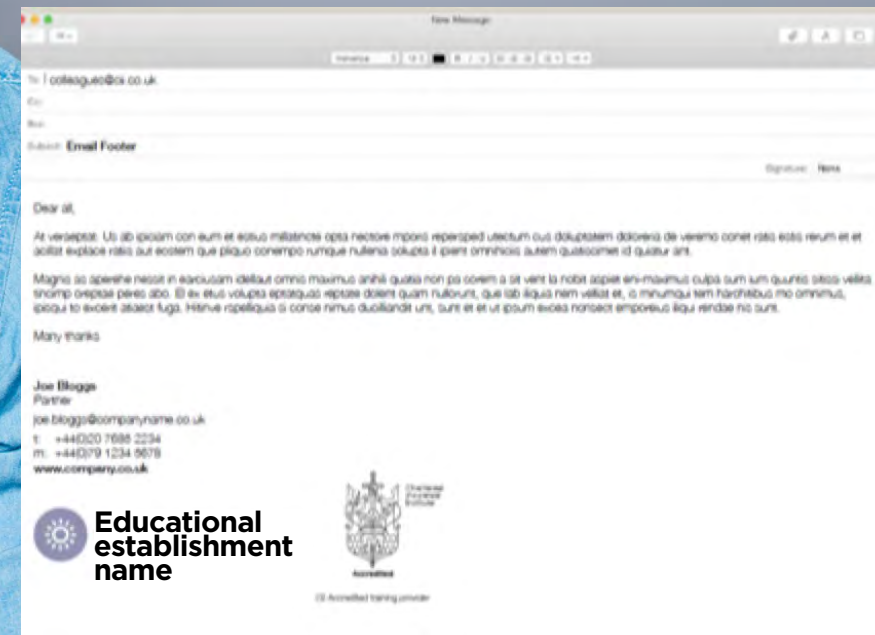
Include details in your offer letters, employee job descriptions and adverts and your institution welcome pack. Students and new employees like to be part of an institution with professional body affiliation.

2. Notify existing students and employees

Inform existing students, employees and business partners of the arrangements in writing. A great opportunity to refresh contact.

3. Overview of the arrangement

Explain the arrangement, how it works in practice and the benefit of CII partnership enabling 'parity of esteem' in comparison to established professions such as medicine and accountancy.



Hints & Tips

4. Membership and Networks -

There are 56 local institutes and 26 regional PFS committees across the UK. Do inform prospective and current students and employees of the benefits of the arrangement. Membership is open to eligible students and lecturers in the UK who are welcome to join FREE of charge Discover membership.

For example, a student at a institution in the Midlands may become a CII member under insurance and attend their Local Insurance Institute meetings and events:

Local institute url - e.g.

 www.cii.co.uk/coventry or birminghaminstitute@cii.co.uk

Or under financial planning or services a member of their local regional PFS committee:

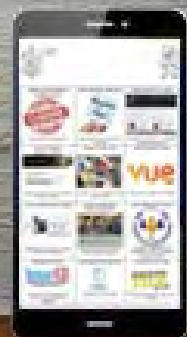
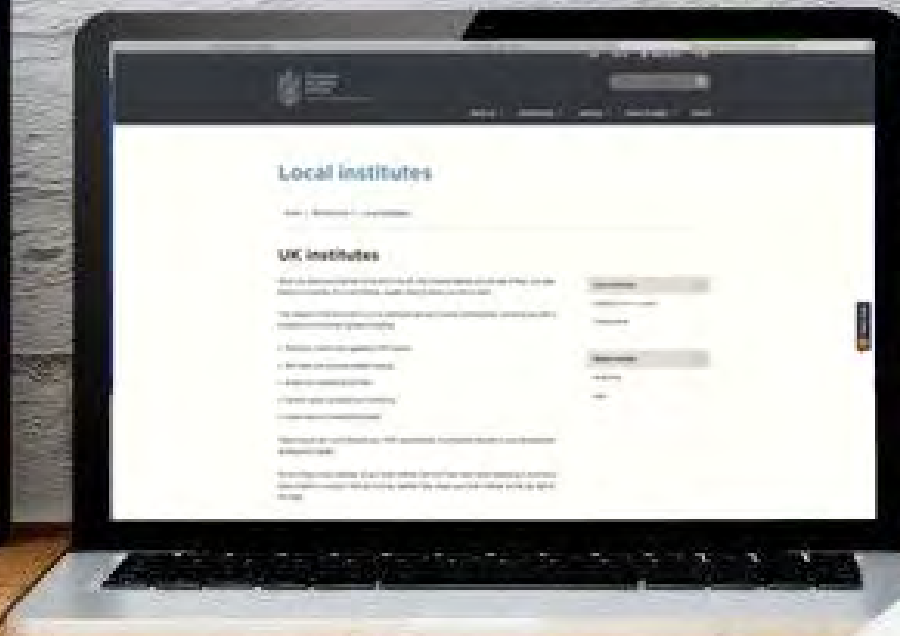
Local Society url - e.g.

 www.thepfs.org/membership/join-us

Encouraging students to become members of the CII and PFS opens networking, mentoring, soft skill development and career opportunities they may not otherwise have access to.

5. Societies

Our five Societies provide access to a dedicated community of professionals that aim to raise levels of professional knowledge and technical competence.



Hints & Tips

The below are neither prescriptive or exhaustive and are set out to provide guidance.

Press Releases

Do contact us - regarding press releases, quotes for general public/profession/Education sector. We welcome working with your internal or external communications teams. We are happy to review and advise should you require assistance, kindly contact our Communications team at



CommunicationsTeam@cii.co.uk



Tone and Language

Do be clear on arrangement that your institution has with the CII.

When sharing arrangements with the CII as a professional body, it is important that it is communicated that CII qualifications are self-directed learning and not a programme of study offered by your institution. Otherwise, arrangements will fall under CII Accreditation arrangements, see opposite.

CII Accreditation

Do note Accreditation encompasses:

Recognition of Prior Learning (RPL) - credits into the CII Qualification Framework

Claiming of exemptions for relevant exams and qualifications obtained through other professional bodies or universities.

Unit Exemptions or credits from the CII Qualification Framework

Exemptions or credits earned from CII Qualifications through academic programme of study under arrangement.

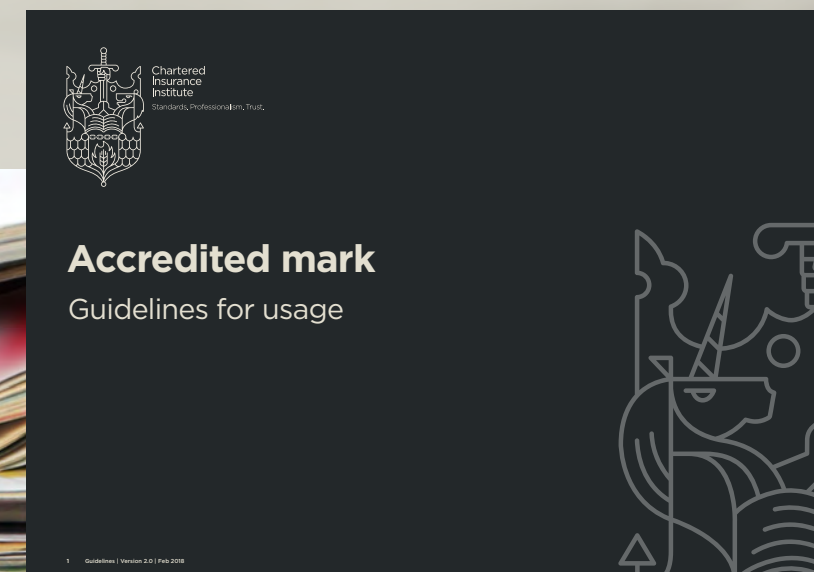
CII Higher Education Aligned

Where students acquire unit credits or a CII professional qualification along side undertaking an academic degree programme study at your institution.

Do contact us - we are happy to review and advise on what is produced to ensure that the tone and language are in keeping with your institutions arrangement with the CII. Contact Education Partnerships on



EducationPartnershipCoordinator@cii.co.uk



Hints & Tips

Social Media

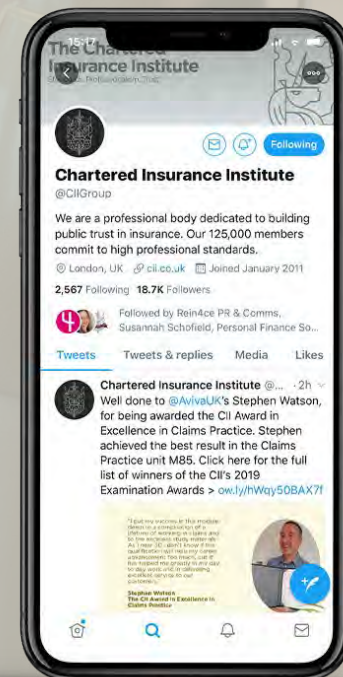
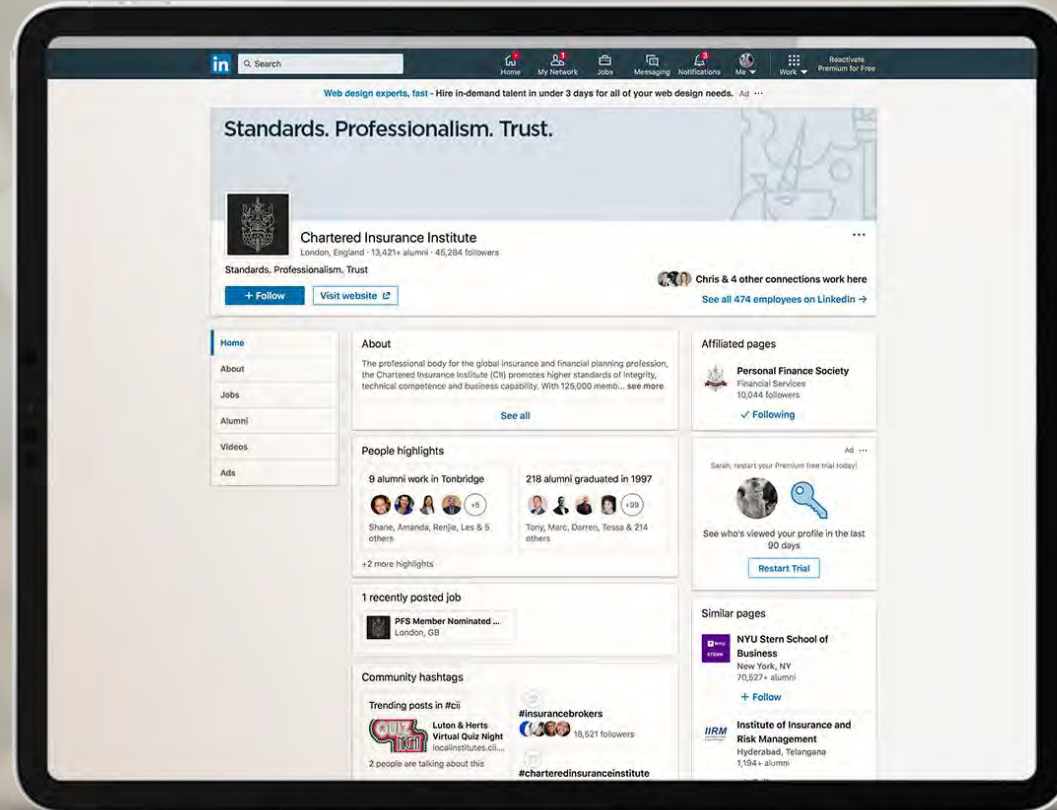
Do tag the CII at @ciigroup - Twitter and @CharteredInsuranceInstitute for LinkedIn and Facebook on the promotion of your arrangements.

Do share where enquirers can find out more information, being careful not to overwhelm with too much text.

Do use imagery related to post.

Intellectual Property/Copyright

Do be aware, under the provisions of the arrangement made by your institution with the CII, your institution may not seek to register any trade mark or trade name (including any company name) which is identical to or confusingly similar with or incorporates any trade mark or trade name which CII or any associated company of CII owns or claims rights in anywhere in the world.





Useful Information

Useful Links

Chartered Insurance Institute
www.cii.co.uk

Personal Finance Society
www.thepfs.org

CII Communications Team
CommunicationsTeam@cii.co.uk

CII and PFS Membership information
www.cii.co.uk/membership/join-us

CII - find out what's going on in your local area – Why you should get involved
events.thepfs.org/public

Ordering materials

Contact Education Partnerships on EducationPartnershipCoordinator@cii.co.uk

Feedback

We trust that you have found this pack helpful. We welcome your input on this toolkit, including ideas for inclusion and improvement. If you have any suggestions please contact EducationPartnershipCoordinator@cii.co.uk

Finally, working with you, we believe we will successfully partner and enhance our commitment to the CII ethos of building public trust in the insurance and financial planning profession.

Our strapline - **Standards. Professionalism. Trust.**

