

Bespoke Modules

In addition to this module we provide compliance and insurance modules which are aimed at all levels of staff. These really do help in providing a basic level knowledge in many compliance and technical insurance areas. They are also great for providing refresher training. We can also provide bespoke modules on your firms policies and procedures and design modules on the product you sell to help train your staff or if you are a wholesaler in the distribution chain, you can provide access to your product modules and test. This helps demonstrate your commitment to ensuring those who sell your product in the chain have received appropriate training.

See our website for details of these – www.workoutmatters.co.uk



CONDUCT workout

Who are Create Solutions Ltd?

Create Solutions Ltd specialises in general insurance compliance and training. Its experience and expertise is specific to this area. Our directors have spent their entire working lives in the insurance sector and have extensive experience in general insurance training.

Create Solutions has been dealing with financial services compliance for over ten years. In addition to their face-to-face client support, they have organised and delivered countless workshops and lectures on regulatory matters to the general insurance market. They have an expert and in-depth understanding of regulation, as it applies to general insurance and this has been gained through their experience in dealing with firms of all sizes, both in the UK and abroad.

Speak to us...

An easy way to train
and test your staff in the
Code of Conduct

www.workoutmatters.co.uk



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STRAIGHT TO THE POINT

• Compliance • Training • GDPR

Introduction

Workout is a Computer Based Training and Testing tool from **Create Solutions Ltd.** It has been designed to be simple, easy to use and an inexpensive solution to your Code of Conduct training worries.

Who is it for?

All those who work for a firm regulated by the FCA.

Why do you need it?

- Firms are directly responsible for ensuring their staff are familiar with the code of conduct and know how it applies to them in their job role. If a member of staff is disciplined as a result of a breach, the FCA may have to be informed
- The code of conduct is high level and without this training, staff will struggle to understand it and it may put your firm at risk. The regulation requires that a director of each regulated firm must take responsibility in writing for ensuring appropriate training takes place
- Workout is the simplest and most cost-effective way of protecting yourself. It will also help in evidencing the new rule that you always act honestly, fairly and professionally in accordance with the best interests of your customers

Benefits

- Your staff will have a knowledge and understanding of the Code of Conduct rules
- The Conduct module will save you time and money

- Your staff are able to take the training course with an integrated testing process
- They therefore don't need a day out of the office
- We have kept the module to a basic level. For senior managers an additional 4 rules will apply
- You can allocate how long you wish staff to spend on this module, but generally will take 30mins to 1 hour to take the module and test

Getting Started

- A copy of the Walkthrough of the system and details of how easy it is to sign up and get started are on our website **www.workoutmatters.com**
- All we need is a list of the candidates who wish to enrol on the module and email addresses of the staff (if your staff members do not have individual email addresses, please provide details of an email address that those candidate can access). It's as easy as that

How it works

- The staff member will progress through each module
- It is in simple bullet point format
- We make the definitions easier to understand
- When they reach the end of the learning material, they take a test to check their knowledge and understanding of the topic
- All question are multiple choice style questions and the answers are contained in the learning material
- If they pass, then they are able to download the Certificate of Accomplishment which can be placed on their training and development file/CPD record

How much will it cost?

- Just £19 plus vat per person for one year. A contract and service level agreement is issued to the purchaser. We have kept the cost low. It is very reasonably priced in comparison to what the market is charging for an on line module

Renewal

- We will aim to notify you at least 30 days before Renewal is due

Updates

- We will continue to update the module if there are changes required

What is in the module?

Background to the Code of Conduct

- The Financial Conduct Authority
- A change to Regulation
- Why are you being Regulated?
- What is meant by Code of Conduct?

Code of Conduct Rules

- What are the Rules?
- Integrity
- Skill, Care and Diligence
- Open and Cooperative
- Interests of Customers
- Market Conduct