



Chartered
Insurance
Institute

Appointment of

Executive Director, Markets & Opportunities

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Introduction

The Chartered Insurance Institute (CII) is a professional body dedicated to building public trust and confidence in the insurance and financial planning professions. We have a global reach with hubs in London, Hong Kong and Dubai, and members and affiliates across the world.

Insurance underpins our whole economy. Almost everyone depends on insurance in some way to live their lives. Insurance creates networks between people and businesses that provide confidence to invest and that can help when something goes wrong. At the CII we help develop technically competent, ethically focused practitioners and practice that people can depend on.

Similarly, on the back of the cost of living crisis it is more important than ever before that people can make the most of their resources. Through the Personal Finance Society, part of the CII group, we work to

build public trust in the financial planning professions so that everyone can have confidence in getting the quality advice that we know gets better outcomes.

Almost every issue affecting the domestic and global economy today is relevant to the professions that form our membership, including AI and technology, climate change, inclusion & vulnerability, and global conflict.

We deliver our mission through relevant learning, insightful leadership and an engaged membership. Our 122,000 members commit to high professional standards by maintaining continuing professional development and adhering to a published ethical code.

We'd like you to join us in that mission and help provide ever greater financial resilience for individuals and societies more broadly.

What we do



For our members

The CII group comprises the foremost professional bodies in insurance and financial planning. We provide a wide range of internationally recognised qualifications and memberships. We support the training and professional development of practitioners across the world. We complement that with a range of professional networks, building on our dedicated local Institutes led by our fantastic volunteers.



For the public

We help build public trust in the insurance and financial planning professions so that everyone can have confidence in making use of the services they provide.



For corporates

We work closely with employers to support staff in their professional development. We provide a range of products to help firms build a professional workforce, and tools to help them make practical sense of regulatory and other obligations.

**“Our vision is that
CII and PFS
professionals build
a world which
delivers ever
greater financial
resilience for
individuals and
societies more
broadly.”**



The opportunity

The CII is now looking for an Executive Director, Markets & Opportunities.

This is a new role, working at the highest level of executive leadership at the CII. We are in the process of transforming the way CII is led, with a clear focus on collaboration in the interests of the whole Institute and its members. The first responsibility for any Executive Director is, therefore, to work with colleagues to lead the Institute effectively, ensuring a focus on purpose, performance, and value for money.

Each Executive Director is, however, asked to focus on particular areas of interest on behalf of the team. For this role, the mission comprises:

- Growing professionalism by educating and supporting members, businesses and other customers to choose the right learning or experiences for their needs.
- Expanding the Institute's reach, credibility and influence by growing the range of organisations working with us to develop their practice standards and professional offer.
- Establish and implement a strategic approach to the Institute's international presence.
- Collaborate with the Insights Team to conduct market research, analyse customer expectations, and develop effective plans to capitalise on commercial opportunities that are aligned to our Royal Charter purpose.
- Making use of extensive market experience and business engagement skills, supply intelligence and insight to inform the Institute's strategic and policy agendas and its suite of learning, content and other products.
- Setting the strategic vision for the Institute's programme of events, underpinning our sector thought leadership ambitions and fostering strong relationships with stakeholders to attract sponsorship and deliver impact.

Success in the role will see the Institute recognised for its growing influence in developing high standards across the profession; and having an agile, commercial approach to identifying and seizing opportunities for increased reach.

Key responsibilities

Commercial strategy

The Executive Director, Markets and Opportunities will lead the development and implementation of the CII's commercial strategy, aimed at supporting and bolstering CII's ability to deliver sustainably against its mission of building public trust and confidence in the insurance and financial planning professions.

The commercial strategy will support, and provide resources for, the Institute's mission and values, while addressing market dynamics and industry trends. By leveraging market insights and competitive analysis, the Executive Director will identify opportunities to enhance CII's market presence, broaden its reach, and strengthen its credibility as a leader in the sector.

They will develop insights derived from thorough analysis to form a deep understanding of the requirements and expectations of existing members, employers, and learners; ensuring their needs are met across all aspects of our offerings, including proposition, product, policy, and thought leadership. By proactively identifying and addressing customer needs and opportunities for improvement, strive to enhance customer satisfaction, loyalty, and retention, ultimately driving long-term success and growth for the Institute.

Partnerships

The Executive Director will research and develop key strategic partnerships, actively identifying potential partners and assessing the value proposition of each partnership opportunity. Prioritise partnerships based on their potential value and impact on the Institute's objectives, focusing on those that align closely with the CII's mission and strategic goals.

Marketing & Events

Working with subject experts, the Executive Director will define and implement the Institute's marketing strategy to ensure that key stakeholders, including members, corporate partners, learners, and the wider public, receive insightful and relevant content, while widening the reach of the CII across existing and new markets. They will drive the Institute's digital marketing strategy, fully utilising the existing web platform to disseminate engaging and impactful content.

They will set the strategy and vision for the Institute's extensive programme of events, leveraging existing and new relationships to attract sponsorship and build events that inform and delight our members, while ensuring alignment with our purpose.

Sales

The Executive Director will implement, improve, and maintain sales processes tailored to achieve specific organisational and customer objectives, ensuring alignment with customer expectations and satisfaction. They will establish and implement a Customer Success approach aimed at fostering strong, lifelong relationships between the CII and its members.

International

They will implement the Institute's International strategy by collaborating with internal and external stakeholders to build the Institute's international presence and influence. This includes spearheading initiatives focused on thought leadership, market analysis, and strategic partnerships to expand the Institute's reach in key global markets. They will lead with an International mindset so products and process are built once and can cater for all audiences – where this is appropriate.



Person specification

Requirements

Strategic vision: Demonstrated ability to develop and execute strategic plans aligned with the Institute's goals and market trends, with a focus on driving sustainable growth and fostering innovation.

Leadership skills: Proven track record of effective leadership, with the ability to inspire and motivate teams, drive performance, and cultivate a culture of collaboration, accountability, and continuous improvement.

Relevant experience: Strong senior experience in business development, sales, marketing or events, with a track record of designing and delivering innovative commercial strategies for growth.

Commercial acumen: Strong business acumen and understanding of commercial dynamics within the insurance and financial planning industries, including market analysis, customer segmentation, and revenue generation strategies.

Stakeholder engagement: Excellent interpersonal and communication skills, with the ability to build and maintain strong relationships with internal and external stakeholders, including members, partners, industry organisations, and regulatory bodies.

Creative thinking: A forward-looking mindset, capable of identifying and capitalising on emerging opportunities, leveraging technology and data analytics to drive competitive advantage and enhance customer experience.

Global perspective: Experience in developing and implementing international strategies, with a deep understanding of global markets, cultural nuances, and regulatory environments relevant to the insurance and financial services sectors.

Results orientation: Proven track record of delivering measurable results and achieving key performance indicators, with a focus on driving revenue growth, market expansion, and customer satisfaction – all in support, however, of the public value mission set by our Royal Charter.



Person specification

Expected Behaviours

As an Executive Director, you are expected to exhibit exemplary leadership behaviours that foster a positive and productive CII culture. This includes consistently demonstrating integrity, transparency, and accountability in all interactions and decisions. Building trust is paramount; therefore, you must communicate openly, listen actively, and engage with all stakeholders with respect and honesty.

Ensuring consistency in your actions and decisions will reinforce reliability and predictability, key elements in establishing a trustworthy environment. Your leadership should inspire confidence and commitment, promoting a culture where ethical standards and the Institute's values are upheld, and where every team member feels valued and empowered to contribute to the CII's success.

Furthermore, the Executive Director will play a pivotal role in leading and nurturing our talented team, fostering a culture of excellence, collaboration, and innovation. Your responsibilities will include, guiding talent acquisition and development efforts, and ensuring the well-being and professional

growth of our employees. You will be responsible for setting clear performance expectations, offering regular feedback, and coaching, and resolving conflicts in a timely and constructive manner.

You will champion diversity and inclusion initiatives, promote open communication and transparency, and uphold the highest standards of ethics and professionalism. Your leadership in people management will be critical in driving CII's success and creating an equal, diverse, positive, and rewarding work environment for our team.



Terms of Appointment

- **Location:** London
- **Position type:** Full Time Permanent
- **Grade:** 1
- **Department:** Markets & Opportunities
- **Reporting to:** CEO
- **Salary:** Competitive, including short-term and long-term incentive schemes.

Due diligence

Due diligence will be carried out as part of the application process, which may include searches carried out via internet search engines and any public social media accounts.

Equal Opportunity Employer

The Chartered Insurance Institute is an equal opportunity employer. We celebrate diversity and are committed to creating an inclusive environment for all employees.

This job description is intended to provide a general overview of the position and does not encompass all responsibilities and qualifications required for the role. The Institute reserves the right to modify the job description as needed.



How to apply

Saxton Bampfylde Ltd is acting as an employment agency advisor to the CII on this appointment.

Candidates should apply for this role through our website at www.saxbam.com/appointments using code AATAEE.

Click on the 'apply' button and follow the instructions to upload a CV and cover letter and complete the online equal opportunities monitoring* form.

The closing date for applications is **noon on Monday 30 September 2024.**

GDPR personal data notice

According to GDPR guidelines, we are only able to process your Sensitive Personal Data (racial or ethnic origin, political opinions, religious or philosophical beliefs, trade union membership, genetic data, biometric data, health, sex life, or sexual orientation) with your express consent. You will be asked to complete a consent form when you apply and please do not include any Sensitive Personal Data within your CV (although this can be included in your covering letter if you wish to do so), remembering also not to include contact details for referees without their prior agreement.



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