FORENSIC INTERVIEW SOLUTIONS™

Effective Insurance Conversations

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Project overview: Effective Insurance Conversations

OVERVIEW:

This course provides delegates with the knowledge, understanding and skills required to facilitate any meeting/interview with an investigative purpose. The tools and techniques learned will help individuals make their conversations with interviewees more efficient, reducing the need to return to verify or probe for more information and enhance their personal credibility with clients.

In this two-day workshop, delegates will learn a process and techniques to enhance the quality of the Insurance meetings/interviews they conduct. The course focuses on building influencing skills and questioning techniques that will help advisors secure a detailed, reliable, and accurate account whilst avoiding confirmation bias and other common cognitive fallacies.

In order to tailor the course we will require input from relevant people to understand how current Insurances/interviews are being conducted, methodology and the current standards of questioning and information retrieval.

Subject matter specialists with many years of applied experience conducting and evaluating the most challenging interviews deliver the course.

The course is delivered with a ratio of 1 trainer to 7 participants to allow sufficient time for role-play and individual feedback.

LEARNING OBJECTIVES

Upon completion of this seminar delegates will be able to:

- Understand the PEACE model of interviewing and appreciate its application to Insurance.
- Conduct meetings/interviews according to the principles in the PEACE framework.
- Utilise proven questioning techniques to gather and verify information.
- Improve their interpersonal influencing ability with clients to facilitate effective recommendations.
- Use a structured note-taking system.

DAY ONE

Session 1: Introduction to PEACE interviewing

The process for conducting interviews, founded upon the principles of a widely used and acclaimed framework known as the 'PEACE' model of interviewing, internationally recognized as the most ethical and thorough model to guide the investigative interview process.

- Planning and Preparation – Interactive group presentations activity.
- Engage and Explain – how to deal with the early phases of an interview and build rapport.
- Account, Clarification, Challenge - the process used to obtain the interviewee's recollection of their needs, to obtain the fullest possible account from the client. How to probe into details and challenge the veracity of the account, identifying weaknesses and inconsistencies.
- Closure and Evaluate - Interviewer ensures there is a planned closure rather than an impromptu end. Material gathered should be fully evaluated, including consideration as to whether the objectives were achieved.

Session 2 The Memory Process

- Understanding how memory is encoded, stored and retrieved.
- The implications of this process for obtaining accurate information from clients.
- Do's and don'ts of interviewing for accurate memory recall.

Session 3 Questioning Skills

- An interactive practical examination of conversational techniques used to initiate and facilitate dialogue.
  The interviewer's approach, listening, opening up topics for discussion, encouraging the interviewee to give a truthful and accurate account, using questions, taking notes and highlighting areas needing clarification and challenge.
- Credibility Assessment; understanding how clients can create false perceptions in the mind of another person.
- How to identify systematically transient changes in an individual's pattern of non-verbal and verbal behaviour.

Session 4 Note Taking

When conducting interviews, Advisors face the formidable task of having to actively listen, formulate questions and take notes simultaneously. In the absence of a structure to taking their notes, Advisors may be inclined to make a contemporaneous written record of the information provided by the interviewee.

This session builds on the existing practices of participants and teaches three different note-taking systems that helps Advisors:

- plan and prepare for interviews
- take notes during interviews
- summarise the information from interviews

Session 5: Conversation Management

- The Conversation Management Model used to assist recollection and sharing of information.
- Case study: interactive and practical examination of a scenario tailored to Insurances.

DAY TWO

Session 6 The Peace Framework In Action (Role Plays)

- Delegates participate in a role-play meeting/interview.
- Scenarios need to be created around realistic scenarios for Insurance.
- Evaluated and given feedback by the trainer according to a structured ratings scale that assesses their performance on each element of the interview/meeting. This builds their confidence as well as highlighting areas for further development.

Authorised Financial Advisors

- To train and develop Authorised Financial Advisors in line with the Code of Professional Conduct in the following areas:

- To develop essential information gathering skills for Advisors to have an up-to-date understanding of the client's financial situation, financial needs, financial goals, and tolerance for risk.

- To provide a professional interview structure, which will ensure a personalised service, suitable for the client to ensure they receive the correct financial products.

- To increase the quantity and quality of information obtained from clients to provide an effective service and to perform the Advisors obligations in a timely manner.

- To improve on how Advisors manage the conversation with the client to enable them to make quality financial recommendations.

- To improve the effective management of any conflicts of interest that may arise and provide services in a transparent manner.

- To develop effective communication skills' ensuring the client understands they are regarded as a wholesale client for the purpose the Codes of Practice (verbal & written).

Business Outcomes:

· Increasing the quantity of information obtained from client's leading to the improved recommendation of financial products.

· Improving the quality of information obtained from the interview enabling the Advisor to define the needs of the client more concisely.

· Providing Advisors with the necessary skills to competently interview using appropriate questioning leading to better outcomes and solutions for the advisor and their client.

· Improving Advisor communication skills with a proven interview structure leading to a successful 'fact find' needs analysis.

· Recognising the difference between the legitimate statements and potential fraudulent claims made by a client.

· Development of Interview Skills in line with the Financial Advisors Act and The Code of Professional Conduct leading to four unstructured credits for continuing education.

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