



Ollscoil  
Teicneolaíochta  
an Atlantaigh

Atlantic  
Technological  
University

**BA (Hons) in Insurance Practice Insurance**

# **Work Based Learning - Tasks**

**First Year – Semesters 1-3**

**September 2024**



*The*  
**Insurance  
Institute**



Work-based learning encompasses a wide array of learning experiences and in order to assess this learning we have developed a range of assessment tools to avoid over reliance on any single instrument. The work-based tasks enable the apprentice to demonstrate their application of 'off the job' learning and support lifelong learning.

There are a range of tasks, which form part of the assessment of the insurance modules in Year 1 and Year 2. Every opportunity has been taken to give the apprentice a choice of tasks in their chosen stream, either Life or Non-Life and an additional list of Generic tasks where possible. Each module has a mandatory number of tasks to be completed and that number can differ per module/per semester.

### **PLEASE READ THE REQUIREMENTS CAREFULLY**

#### **1. Completing the Tasks**

The apprentice **must complete all mandatory tasks** and the required number of elective tasks each semester. A task completion report form must be completed for each task and submitted to your supervisor to be verified and signed.

**The expected word count for each task is 500-1000 words.**

#### **2. The role of the supervisor**

The apprentice will complete the tasks and submit a task completion report form to their nominated supervisor to verify that it has been completed. The supervisor does not grade the completed task. A task completion report form is attached in **Appendix 1**.

The role of the supervisor is to:

- Assist the apprentice to locate industry and employer resources if required.
- Verify that the task has been completed by the apprentice (complete or not complete basis)

### 3. Deadlines for submitting task completion report forms:

Task: Semester 1 Submission deadlines:	
1	3 Oct 2024
2	10 Oct 2024
3	17 Oct 2024
4	31 Oct 2024
5	07 Nov 2024
6	14 Nov 2024
7	28 Nov 2024

Task: Semester 2 Submission deadlines:	
1	30 Jan 2025
2	06 Mar 2025
3	10 Apr 2025

Task: Semester 3 Submission deadlines:	
1	03 Jul 2025
2	31 July 2025
3	14 Aug 2025

**Remember:** these are the final deadlines for uploading the signed task completion report forms to Moodle.

Apprentices and supervisors should agree an appropriate schedule for discussing, completing, and signing the report forms to ensure that these deadlines are met.

### 4. Forward planning

Issuing the tasks in advance allows plenty of time for the apprentices and supervisors to meet the submission deadlines. It also gives adequate notice of any documents and/or resources that need to be sourced for or by the apprentices.

### 5. Advice on Data Protection:

Employers and supervisors must ensure that all work-based learning activities comply with the relevant Data Protection legislation and any other legal/regulatory requirements on an ongoing basis. This may, for example, include anonymising or changing the name, addresses and other personal or sensitive information in any case files and other resources.

# Semester 1 - Work Based Learning Tasks

## Semester 1 (September – December):

5 Mandatory tasks and 2 Elective (weekly)

End of semester reflective diary

## Purpose of Work based Learning Tasks:

The purpose of the first set of work-based tasks is primarily to provide you with the opportunity to familiar yourself with your employer and the insurance profession. To encourage and support you to plan your workload, leisure, and study time over the coming months to enable you to succeed in the apprenticeship.

This assignment will help you practice the following skills:

- Professional Communication – engaging with your supervisor and colleagues/peers.
- Work-based Collaboration – reaching out to colleagues and peers to complete work and develop networks.
- Research – finding and presenting information professionally and in line with your employer's expectations.
- Planning – a key skill for any professional is time-management and scheduling.

This assignment will help you gain the following knowledge:

- Specialised knowledge – you will develop a key understanding of your employer and the market they work in.
- Practical understanding of facts, concepts, rules, regulations, and how they are applied in your area of insurance.

## Semester 1 Modules:

- The Nature of Insurance or QFA Life Insurance
- Professional Business Communication
- Teamwork and Workplace Collaboration

## Completing the Tasks:

For the Nature of Insurance (CIP01) and QFA Life Assurance practice modules in Semester 1 there are **5 mandatory tasks and 2 elective tasks from a choice of 3**. The tasks provide opportunities to develop a greater understanding of your company, the insurance industry as a whole and to prepare you for your apprenticeship. They are practical in nature, and you are expected to research within your organization and relevant websites where appropriate (with guidance from supervisors).

The following is a list of the tasks for ALL apprentices (Life and Non-Life):

Task	Status	Title	Description
1	Mandatory	<b>Business Etiquette</b>  <a href="https://www.youtube.com/watch?v=qWbWL0l3ySk">https://www.youtube.com/watch?v=qWbWL0l3ySk</a>  Every organization will have their own way of doing things but if in doubt ask!  <a href="https://www.americanexpress.com/en-us/business/trends-and-insights/articles/15-vital-business-etiquette-rules/">https://www.americanexpress.com/en-us/business/trends-and-insights/articles/15-vital-business-etiquette-rules/</a>	Review your staff handbook and answer the following regarding your organisation's policies:  <ol style="list-style-type: none"> <li>1. What is the dress code within your organisation?</li> <li>2. Punctuality policy</li> <li>3. Internet usage policy</li> <li>4. Personal phone usage policy</li> <li>5. Business Communications – phone/email – is there templates/policies and procedures to follow?</li> <li>6. Remote working policy</li> </ol> <p><i>Note:</i> if your organisation does not have a staff handbook discuss with your supervisor to find out the information.</p>
2	Mandatory	<b>Personal Study/Time Management Plan</b>  <a href="https://instituteofeducation.ie/free-study-resources/study-skills-resources/">https://instituteofeducation.ie/free-study-resources/study-skills-resources/</a>  Examples of study plans are available on Moodle.	Create a personal study/time management plan for the academic year that incorporates busy periods at work, holidays and holiday cover, deadlines, issues, challenges and priorities.  As part of this exercise, you are required to arrange a time to sit down with your supervisor to:  <ul style="list-style-type: none"> <li>• Share the submission calendar/schedule with your supervisor. This has been emailed to you and is available on Moodle.</li> <li>• Agree with your supervisor how far ahead of the submission dates do they wish to receive your work to review and sign-off.</li> <li>• Discuss their role as your supervisor &amp; share with you, key dates in their, and the business' calendar; to ensure you meet all submission deadlines.</li> </ul> <p>Ensure you share the semester calendar (work-based learning (WBL) submission dates) and agree a plan with your supervisor for submitting them for sign-off so that they can be uploaded by the deadline dates provided.</p> <p>Ensure you include downtime, key holidays, etc. in the plan.</p>

			<p>Some modules and topics may require more effort than others.</p> <p>Update your plan as you become more familiar with your workload and the time required to complete the work.</p>
3	Mandatory	<b>Acronyms</b>	List 10 terms/acronyms with their meanings, which you have come across in your organisation or industry, which you were not familiar with when you started.
4	Mandatory	<b>Competitors</b>	<p>Identify three competitors of the business – review their websites and outline their main USPs in your opinion.</p> <p>Which competitor has the most impressive website in your opinion and why?</p>
5	Mandatory	<p><b>Student Wellbeing and looking after yourself.</b></p> <p>If you do not wish to use the ATU toolkit. Below is a link to a range of apps that are available to students.</p> <p><a href="https://host-students.com/wellbeing-apps-for-students/">https://host-students.com/wellbeing-apps-for-students/</a></p>	<p><a href="#">Being Well, Living Well</a> is an interactive, online tool kit available to all students in ATU Sligo. The toolkit takes a positive, preventative approach to help you to maintain your mental, physical, emotional, and financial wellbeing. <a href="#">The toolkit is available by clicking here (you will need to log into Moodle to access): Being Well, Living Well</a></p> <p>Write a short summary explaining the tool kit to your supervisor, listing the various units that the toolkit covers and the benefits that it can have to you as a first-year apprentice.</p>
6	Elective	<b>Find an Apprentice Buddy</b>	<p>At induction you were encouraged to set up a WhatsApp Group.</p> <p>Reach out to one apprentice that you met (not working in your organisation) and organise a quick chat on Teams or any online platform.</p> <p>Take a screenshot and find 3 things you have in common!</p> <p>Provide a screen grab or selfie with a few lines on what you have in common.</p> <p><b><u>Apprentices that find buddies/peers build their network really benefit from the shared support.</u></b></p>

Task	Status	Title	Description
7	Elective	<b>Here one I made earlier!</b>	<p>Is there a task that you could add to this list? Does your organisation have a fantastic induction procedure that you feel other apprentices could benefit from? Did you do something yourself that you felt made the first few weeks in a new organisation easier to navigate?</p> <p>Discuss your proposed new task with your supervisor and if they agree please share!</p> <p>Provide a short overview of the task.</p>
8	Elective	<b>Influencer</b>	<p>Find one blog or influencer to follow that you believe can support you in your career development.</p> <p>Give a brief overview of the blog/influencer and your reasons for choosing them (your choice does not have to be insurance related).</p>

# Semester 2 - Work Based Learning Tasks

## Semester 2 (January to May):

3 Monthly tasks

End of semester reflective diary

## Semester 2 Modules:

- Compliance and Advice or QFA Regulation
- Technical Communications
- Customer Service

## Purpose of Work based Learning Tasks:

The purpose of the second set of work-based tasks is to introduce you to the advocacy bodies and other areas that are associated with the insurance industry and provide you with an opportunity to familiarise yourself with their role and responsibilities.

This assignment will help you practice the following skills:

- Research – a key skill that you will require throughout your learning and career journey is the ability to research, summarise and present key facts.
- Exercise initiative - these tasks require you to work independently to source knowledge and evaluate what you read and hear.

This assignment will help you gain the following knowledge:


- Evaluate and maintain professional knowledge - the tasks outlined below introduce you to organisations and bodies that will form the foundation of your career going forward.
- Broad and up-to-date specialised knowledge – these tasks will ensure you have up-to-date knowledge in a variety of areas comprising the professional discipline of insurance.

## Completing the Tasks:

For the Compliance and Advice (CIP02) and QFA Regulation practice modules in Semester 2 there are **3 tasks to be completed**; 2 are MANDATORY and an additional 1 can be chosen from ANY OF THE SECTIONS (Generic, Non-Life or Life) below.

Task	Status	Title	Description
1	Mandatory	GDPR	What constitutes a data breach?  Who do you inform if a data breach occurs? How do you report it?
2	Mandatory	<b>Advocacy Bodies &amp; Consumer Vulnerability and Trust.</b>  <a href="https://shorturl.at/NPNKi">https://shorturl.at/NPNKi</a>	List all the advocacy bodies for consumers that cover finance, pensions and insurance in Ireland and give a brief description of each? Write a short report to explain: <ul style="list-style-type: none"><li>• Why is consumer vulnerability and trust important?</li><li>• How can you build consumer trust?</li><li>• Write a short summary of your thoughts.</li></ul>



Please select <b>one</b> of the following tasks to complete:			
3	Elective (Generic)	<b>Climate Curious</b>  	<p>Climate Change is impacting on all our lives, and it is a key strategic priority for many insurers. This podcast is not about insurance but if you find the current conversation about climate change confusing, scary or boring – then this might be the podcast for you. Co-hosts Maryam Pasha and Ben Hurst lift the lid on the climate emergency by speaking to the world’s leading and most relatable climate pioneers.</p> <p><a href="https://podcasts.apple.com/gb/podcast/climate-curious/id1534594079">https://podcasts.apple.com/gb/podcast/climate-curious/id1534594079</a></p> <p>Share your thoughts on the topic discussed in any chosen podcast with your supervisor at an agreed meeting either in person or online</p>
4	Elective (Generic)	<b>PowerPoint</b>	<p>Choose one of the following training videos to watch from your student <a href="#">LinkedIn Learning   ATU - Atlantic Technological University</a></p> <ul style="list-style-type: none"> <li>- PowerPoint Quick Tips</li> <li>- PowerPoint Essential Training (Microsoft 365)</li> <li>- PowerPoint: Designing Better Slides</li> </ul> <p>Prepare a PowerPoint presentation (1-2 slides to summarise what you learned (a copy of the presentation should be uploaded to Moodle)</p>
5	Elective (Generic)	<b>Consumer Insurance Contracts Act 2019</b>  <a href="https://www.irishstatutebook.ie/eli/2019/act/53/enacted/en/html">https://www.irishstatutebook.ie/eli/2019/act/53/enacted/en/html</a>	<p>What is CICA? When did it come into law?</p> <p>Write a summary of what the legislation means for insurers.</p>
6	Elective (Generic)	<b>Cyber Security</b>	<p>Over 70% of Irish companies were hit by at least one cyber-attack in 2023 data shows. The 2023 Hiscox Cyber Readiness report shows a 22% increase in 2022, when just 50% of firms reported an attack. Ireland had the highest median average number of attacks in all countries studied a fourfold increase on the previous year.</p> <p>Source and list at least 3 websites you would use to inform yourself about Cybersecurity in both a personal and business context.</p>

7	Elective (Generic)	<b>Central Bank</b>	<p>Visit the link <a href="https://www.centralbank.ie/publication">https://www.centralbank.ie/publication</a> and choose a research piece that would be relevant to your business.</p> <p>Summarise the key points and write a short report for your supervisor.</p>
8	Elective (Non-Life)	<b>Passporting</b>	What is passporting and why does it matter?
9	Elective (Life)	<b>Financial Services &amp; Pensions Ombudsman</b>	Discuss the role of the Financial Services & Pensions Ombudsman in the event of a complaint?
10	Elective (Life)	<b>Financial Services &amp; Pensions Ombudsman</b>	Visit <a href="https://www.fspo.ie/">https://www.fspo.ie/</a> , review the website and report on the 3 most useful/interesting resources available.

# Semester 3 - Work Based Learning Tasks

## Semester 3 (June to August):

3 Monthly tasks

End of semester reflective diary

## Semester 3 Modules:

- Personal General Insurance
- QFA Loans

## Purpose of Work based Learning Tasks:

The purpose of the third set of work-based tasks is to introduce you to some key trends in insurance such as InsurTech and ESG. The tasks will also ask you to consider how consumers feel about insurance products and the role of price comparison sites.

This assignment will help you practice the following skills:

- Professional Communication – engage with customers to ascertain their insurance needs.
- Demonstrate the ability to assess the housing, consumer credit and associated insurances needs of consumers.
- Excel – you will develop a working knowledge of excel.

This assignment will help you gain the following knowledge:

- Specialised knowledge – you will understand the growing importance of InsurTech and ESG to the sector.
- Practical understanding of facts, concepts, rules, regulations, and how they are applied in your area of insurance.

## Completing the Tasks:

For the Personal General Insurance (CIP03) and QFA Loans practice modules in Semester 3 there are **3 tasks to be completed**; 2 are mandatory and an additional 1 can be chosen from ANY OF THE SECTIONS (Generic, Life and Non-Life).

Task	Status	Title	Description
1	Mandatory	<b>Insurtech</b> <a href="https://www.insurtechireland.org/about">https://www.insurtechireland.org/about</a>  <b>InsurTech Ireland</b>	Sign up to the <a href="https://www.insurtechradio.com/">Insurtech podcast</a> and blog at <a href="https://www.insurtechradio.com/">https://www.insurtechradio.com/</a>  Choose a podcast or webinar from those listed on Insurtech Radio and discuss what you found interesting (or not) from the session with your supervisor at an agreed meeting either in person or online.  Alternatively, sign up to InsurTech Ireland which is a forum for sharing ideas and knowledge about the ways that technology is changing insurance. They

			12 help business and technology professionals in the insurance industry to learn about new technologies and to consider how these technologies can best be utilised. They run face to face and virtual events and are a great way to meet insurance professionals and expand your network. Choose an event or webinar from the upcoming list of events (attend) and discuss what you found interesting (or not) from the session with your supervisor at an agreed meeting either in person or online.
Task	Status	Title	Description
2	Mandatory	<b>Excel</b>  <a href="https://support.microsoft.com/en-us/office/excel-video-training-9bc05390-e94c-46af-a5b3-d7c22f6990bb">https://support.microsoft.com/en-us/office/excel-video-training-9bc05390-e94c-46af-a5b3-d7c22f6990bb</a>	<p>The use of excel is crucial in business and as an insurance apprentice for future modules.</p> <p>This task introduces you to excel or helps you improve your current knowledge. Watch some of the excel training videos available on the <a href="#">Microsoft website</a> and detail 3 new functions, formulae, formatting tools or function that you learned about and will find useful at work.</p>
Please select <b>one</b> of the following tasks to complete:			
3	Elective (Generic)	<b>Grudge Purchase</b>	<p>Insurance is often viewed as a grudge purchase – define what is meant by this term and why this view might be taken.</p> <p>Discuss how you might combat the concept of a grudge purchase.</p>
4	Elective (Generic)	<b>Brand Loyalty</b>	<p>Name a brand or service that you especially like. It can be anything e.g., Nike, Harvey Norman, Airbnb etc.</p> <p>Think about why you choose to be loyal to this brand/service provider and how this is applicable to the insurance industry. Write a short report and summarise your thoughts.</p>
5	Elective (Generic)	<b>ESG</b>  <a href="https://www.youtube.com/watch?v=m3EGihH4d54">https://www.youtube.com/watch?v=m3EGihH4d54</a>  <a href="https://kpmg.com/xx/en/home/insights/2022/05/esg-in-insurance.html#:~:text=Enviro%20Social%20and%20Governance%20(ESG)">https://kpmg.com/xx/en/home/insights/2022/05/esg-in-insurance.html#:~:text=Enviro%20Social%20and%20Governance%20(ESG)</a>	<p>The Central Bank (CBI) are increasingly embedding ESG into their supervisory assessments and engaging with regulated firms to ensure that they themselves are aware of their exposures and that they are incorporating climate-related risks into prudent risk management and investment practices.</p> <p>Review the video provided regarding ESG and an overview from KPMG. Does your organisation have an ESG policy? If so, please provide an overview of the key points.</p>

## **Appendix 1**

### **Task Completion Report Form**

## TASK COMPLETION REPORT FORM

Task No.  Task Title

Task Month

*Note:* Expected word count is 500-1000 words.

### Checklist to be completed by your supervisor:

Task Complete – (please tick as appropriate)	Yes	No

Signed ----- (Supervisor) Date -----

PRINT Name: \_\_\_\_\_

### All the work on this task is my own work:

Signed ----- (Apprentice) Date -----

Student/Apprentice Number \_\_\_\_\_

Once your supervisor has confirmed that you have completed the task, scan and upload this form and any supporting documents to Moodle.

**Please note** that only forms with a scanned original signature are acceptable alternatively you can upload an email from your supervisor stating that you have completed the relevant task listing the task title.