

# MENTAL HEALTH TRAINING FOR INTERMEDIARIES

Intermediaries who deal with protection clients are required to:

- Ask questions about the mental health of their clients
- Share underwriting decisions made about the mental and physical health of their clients
- Speak with people at the time of claim following personal or family tragedy

At any moment an intermediary may be put into a sensitive or difficult conversation with a vulnerable client. In spite of this, most intermediaries do not have any specialist mental health training to prepare them, risking poor outcomes for the client and upset or harm for the intermediary.

## Purpose of training

This interactive workshop will equip intermediaries with the appropriate skills to:

- Protect staff from damage when hearing about potentially upsetting medical histories or experiencing challenge from customers
- Ensure customers have a positive experience when sharing their personal history
- Create an environment where the questioner is trusted and receives the important, sensitive information in the best possible manner
- Reduce the risk of relevant medical information being missed due to lack of confidence to discuss these sensitive subjects, with potential issues around misrepresentation and professional indemnity for the advisor

## Method

Interactive, 4-5 hour sessions tailored to individual group circumstances.

Maximum of 25 delegates per session, with training and support given by experts in both underwriting and mental health.

The training includes:

- Mental health principles and overview
- Why insurers ask the questions they do

- How customers might answer (closed, sceptical, open, upset, anger, triggers)
- Techniques to sensitively and effectively manage with different styles and content of answers
- What insurers do with the answers
- Help to identify and assist colleagues who may be experiencing difficulties
- Methods to improve personal mental health

All materials to be CPD accredited.

## Background and relevant experience

### Andrew Wibberley, Alea Risk Ltd

Alea Risk brings technical underwriting knowledge and understanding of the subject matter and questions asked. This enables deeper insights into the reasons questions are asked - and an opportunity for feedback to enable future improvements to be made

<https://www.alearisk.com>

### Terry Streather, Oakwood Training

Oakwood Training are helping some of the UK's largest companies look after the mental health and wellbeing of their employees. They understand that our health and the way we feel has a huge impact on the way we behave, the decisions we make and our productivity.

Oakwood are passionate about helping companies create a safer, healthier workplace, by placing wellbeing at the very core of what they do. Not only because it's the right thing to do, but because it makes good business sense.

<https://oakwoodtraining.co.uk>

