

Broker Training Course Outline



The Aim of the Broker Training Course is to familiarise delegates with the PPL platform and for delegates to gain practical experience of using the system. The course is an instructor led course of 3 hours in length. Breaks will be scheduled in during the session. Delegates will be provided with laptops to facilitate hands on experience as they work through set scenarios.

At the end of the course, delegates will be able to:

- Navigate around the Dashboard
- Create, review and respond to new Placements: Quotes and Firm Orders, including layered and sectioned risks for Open Market Underwriters and Facility Markets
- Calculate lines, sign and close Firm Orders
- Create, review and respond to Endorsements

The Learning Programme is shown below

Step	Content	Method of Learning	Approximate Timings
Introduction	<ul style="list-style-type: none"> • Introduction to Course and background of PPL • Aim/Learning Outcomes • Log in • Dashboard Navigation 	Trainer demonstration and PowerPoint presentation	20mins
Quotes	<ul style="list-style-type: none"> • Overview of all features and links • Create a new Quote request • Review Underwriter responses to Quotes • Sharing additional information 	Delegates hands on practical	40mins
Firm Orders	<ul style="list-style-type: none"> • Overview of all features and links • Take Quote created to Firm Order • Adding policy layers and sections • Review and action Underwriter responses to Firm Orders. • Agree Line conditions (and/or subjectivities) • Calculate, sign and close lines 	Delegates hands on practical	1 hr 15mins
Endorsements	<ul style="list-style-type: none"> • Overview of all features and links • Create a new Endorsement request • Review Underwriter responses to endorsements 	Delegates hands on practical	20mins
Close	<ul style="list-style-type: none"> • Any further questions • Feedback survey completion 	Discussion	10mins