

Broker Expert User Placing Declarations Training Course Outline



The Aim of the Broker Expert User Placing Declarations 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 1.5 hours in length. 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
- Search for Facility placements
- Create, review and respond to new Declaration Quotes and Firm Orders, including layered and sectioned Declarations
- Calculate lines, sign and close Declaration 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 • Overview of Dashboard Navigation • Overview of Facility Placements 	Trainer demonstration and PowerPoint presentation	20mins
Declaration Quotes	<ul style="list-style-type: none"> • Overview of all features and links • Create a New Declaration Quote Request • Review Underwriter Responses to Quotes • Share additional information 	Delegates hands on practical / Trainer demonstration	15mins
Declaration Firm Order	<ul style="list-style-type: none"> • Overview of all features and links • Take Declaration Quote created to Declaration Firm Order • Overview of adding policy layers and sections • Review and action Underwriter responses to Firm Orders • Agree subjectivities (and/or line conditions) • Calculate, sign and close lines 	Delegates hands on practical / Trainer demonstration	35mins
Endorsements	<ul style="list-style-type: none"> • Overview of all features and links • Create a new Endorsement request for a Declaration Firm Order • Review Underwriter responses to endorsements 	Delegates hands on practical/ Trainer demonstration	10mins
Close	<ul style="list-style-type: none"> • Any further questions • Feedback survey completion 	Discussion	10mins