

Broker Quote Refresher Course Outline



The intended audience for this course is Brokers who are already using the Platform.

The Aim of the Broker Quote Refresher Course is to familiarise delegates with the PPL Platform, and to gain practical experience of quoting 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
- Create, review and respond to new Quotes, including layered and sectioned risks for Open Market Underwriters and Facility Markets
- Create a Firm Order from an existing Quote within PPL.

The Learning Programme is shown below

Step	Content	Method of Learning	Approximate Timings
Introduction	<ul style="list-style-type: none">• Introduction to Course• Aim/Learning Outcomes• Log in• Overview of Dashboard Navigation	Trainer demonstration and PowerPoint presentation	20 mins
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• Layers and Sections	Delegates hands on practical	40 mins
Declaration Quote	<ul style="list-style-type: none">• Create a new Declaration Quote request• Progress a Quote to Firm Order	Delegates hands on practical	20 Mins
Close	<ul style="list-style-type: none">• Any further questions• Feedback survey completion	Discussion	10 mins