



PPL LONG-TERM TRAINING STRATEGY

Version 1.0

July 2016

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1 Overview of Train the Trainer Sessions

During the Terrorism class of business roll-out (the first class of business to roll-out on PPL) the training delivery was classroom-based sessions for the Train the Trainer courses. This was a successful format as the audience was manageable numbers, whereby PPL could manage and co-ordinate instructor-led training sessions. The training course was hands-on and as interactive as possible.

Following the success of the Train the Trainer sessions as part of the Terrorism class of business roll-out, the delivery format will continue for the roll-out of other classes of business with classroom-based training sessions. This should continue in the following different flavours:

- a) Train the Trainer (for those new to the PPL system) – Duration: ½ a day

This course is designed for delegates that have not attended a previous PPL training session and will be learning the system so that they can undertake internal training in their own firms. The course covers the Broker and Underwriter process steps within the PPL Platform so that the delegate has a rounded knowledge of how the system works and has the knowledge and skills to conduct their own internal training sessions.

- b) Train the Trainer (for those familiar to the PPL system) – Duration: TBC

This is a shortened course designed for delegates that are familiar with the PPL system and wish to understand the differences in the system for each class of business. This course will enable delegates to then have the knowledge to deliver their own tailored training sessions within their firms.

2 Management & Scheduling of Train the Trainer Sessions

The Train the Trainer sessions will be managed and coordinated by the PPL team. The principle people managing the training sessions will be the PPL Training Manager and the PPL Roll Out Coordinator. Once the PPL Market Engagement team has liaised with the Market and collated the relevant Broking and Underwriting firms for each class of business, the Roll Out Coordinator will liaise with the Market and obtain the delegate names for the Train the Trainer sessions.

All delegates scheduled to attend a Train the Trainer session will receive a calendar invite from 'PPL Programme' so that internally within PPL we can monitor the acceptances/declines etc. Along with the course invitations will be course outlines summarising the course contents so that delegates are clear of the objectives of the training course prior to attending.

3 Venue for Train the Trainer sessions

The principle location for delivering the training will be the Ebix European office on Old Broad Street (near Liverpool Street station). Ebix are able to facilitate training sessions of up to 10 delegates as well as an instructor. In the event that there are busy periods and there may need to run concurrent training sessions these can take place either in another meeting room at Ebix or using the training room on the 8th floor of the Lloyd's building.

4 Delivery of Train the Trainer sessions

The delivery of Train the Trainer sessions will be conducted by a training instructor from Ebix. The training instructor will cover the process steps in PPL during the different phases from Quote; Firm Order; and Endorsement. The delegates will have their own training machines and obtain hands-on experience of the PPL Platform. All delegates will be encouraged to follow the steps that the instructor is demonstrating. The training sessions will be as interactive as possible with the delegates being given typical 'real-life' scenarios for them to undertake within the Quote; Firm Order and Endorsement phases.

5 Feedback from Train the Trainer sessions

The PPL Training team will develop SurveyMonkey feedback forms for the delegates to complete post their training sessions. These feedback forms will be specifically targeted at obtaining feedback on the trainer; the training facilities; the scenarios covered; and overall impression of the training session. The feedback obtained will be collated and used to continually improve Train the Trainer sessions going forward as PPL rolls-out across further classes of business.

6 SuperUsers Training

The delivery of SuperUsers training will be conducted by a training instructor from Ebix. There will be separate training sessions tailored for Brokers and Underwriters. One SuperUser will have been identified by each Broking and Underwriting firm. The training instructor will cover the process steps in PPL during the different phases from Quote; Firm Order; and Endorsement. The delegates will have their own training machines and obtain hands-on experience of the PPL Platform. All delegates will be encouraged to follow the steps that the instructor is demonstrating. The training sessions will be as interactive as possible with the delegates being given typical 'real-life' scenarios for them to undertake within the Quote; Firm Order and Endorsement phases.

7 Feedback from SuperUsers Training

The PPL Training team will develop SurveyMonkey feedback forms for the delegates to complete post their training sessions. These feedback forms will be specifically targeted at obtaining feedback on the trainer; the training facilities; the scenarios covered; and overall impression of the training session. The feedback obtained will be collated and used to continually improve SuperUsers training sessions going forward as PPL rolls-out across further classes of business.

8 Overview of Practitioner Training Sessions

The numbers of practitioners for further classes of business to be rolled out will be significantly larger (in some cases 1000's of users) than the Terrorism class of business, which is a smaller class of business. Due to the logistics of managing and co-ordinating training across such huge numbers it is proposed an e-learning solution would be the best delivery method of rolling out training across such large numbers. The e-learning would be published and available on a central platform that allows the relevant users to access remotely.

9 Design of E-Learning Materials

Ebix are responsible for the creation of the e-learning training material. The e-learning material will be broken down into training modules. The catalogue of training material will be clearly labelled to indicate what is relevant for a Broker / Broking Technician or an Underwriter / Underwriting Technician. The learning will also break down the modules into the different phases of the typical life-cycle of a risk ie Quoting, Firm Order and Endorsement phases. This will enable the learner to undertake a tailored training session based on their role-type.

The training material will be generic so that a broker or underwriter in the London Market will gain a full understanding of how to use PPL. As more classes of business start rolling out on to the PPL platform there will be tailored modules for each class of business so that these can be incorporated into the catalogue of training modules offered.

10 The E-Learning Training Experience

- 10.1 The e-learning training modules will be a 'virtual' learning experience providing the learner with all the knowledge and skills they will require to use the PPL Platform. The e-learning will 'mirror' the live PPL Platform so that the learner can transfer the skills and knowledge learnt to their working environment when using the PPL system.

- 10.2 At the start of each training module there should be clear scene setting of what will be covered in the module. This will include an introductory slide, and aims and objectives, and the course topic(s) that will be covered.
- 10.3 The content of the e-learning will include captions with clear and concise information explaining the context about what is being taught. The e-learning will contain screen recordings of all the processes that a Broker / Broking Technician or an Underwriter / Underwriting Technician will need to use within the PPL Platform. The e-learning will be an 'interactive' experience for the learner with tasks / scenarios that the learner will need to do within the training module to keep them 'engaged' during the training course.
- 10.4 At the end of the training module there will be recap slides confirming the topic(s) that have been covered. These should replicate the initial topics slide at the beginning of the training module so that there is consistency in the topics that have been covered and consolidates the knowledge that has been learnt.
- 10.5 At the end of every training module there will be a quiz to consolidate the knowledge that has been learnt. The quiz will cover the topic(s) that have been covered during the training module. There will be a pass benchmark, which the learner will be required to achieve. If the learner does not achieve the required pass benchmark they will be required to cover the training module again and retry the quiz.

11 Training Statistics

11.1 Train the Trainer

The PPL training team will be maintaining training statistics of which Brokers and Underwriters have attended the classroom-based training sessions. This will enable the PPL training team to know which firms are then in a position to be able to undertake their own internal training sessions on the PPL Platform.

11.2 Practitioner Training

The e-learning training modules will be stored on a Learning Management System (LMS) platform that will enable training statistics to be obtained. The Learning Management System will be able to produce reports that will show who has launched a training module, who has not completed a training module and who has successfully completed a training module etc. Further reports will enable us to break down which underwriting firms and broking firms have attended the training sessions.

12 Feedback from e-learning training sessions

SurveyMonkey feedback forms will be sent to delegates that have attended e-learning training courses. It is important for the PPL Training team to obtain feedback from the Market so that we can continually improve our e-learning training modules going forward as PPL rolls-out across further classes of business.

13 Supporting Training Materials

13.1 User Guides

The following User Guides will be available and maintained going forward through later releases of the PPL system

- PPL Broker User Guide
- PPL Broker Endorsements User Guide
- PPL Underwriter User Guide
- PPL Underwriter Endorsements User Guide

The User Guides will cover the end-to-end process within the PPL Platform.

13.2 Quick Reference Guides

A catalogue of quick reference guides will be created and maintained. The quick reference guides are short guides focusing on specific areas/topics within the PPL Platform.

13.3 Training Videos

A catalogue of training videos will be created and maintained. The training videos will be bite-sized demonstrating specific features within the PPL Platform.

13.4 Storage of Supporting Training Material

The User Guides, Quick Reference Guides and Training Videos will all be available on the PPL website for the Market to access. The supporting training material can be found in the following location: <http://isupporttom.london/> and then select 'Document Library' and 'Placing Platform Limited (PPL)'.