PROFESSIONAL TRAINING COURSE

Course No. 1994

Advanced Insurance Brokerage & Intermediary Management Training Course

INSURANCE BROKING & INTERMEDIARY MANAGEMENT
INSURANCE & RISK MANAGEMENT

DURATION
5 Days

DELIVERY
Classroom

Course Overview

The Advanced Insurance Brokerage & Intermediary Management Training Course provides an advanced framework for managing insurance brokerage activities and intermediary relationships within increasingly complex insurance markets. The program focuses on strengthening brokerage performance, market placement capabilities, intermediary governance, client value, regulatory compliance, and sustainable commercial results.

The course examines advanced brokerage practices across the insurance distribution lifecycle, including intermediary strategy, client portfolio management, risk assessment, market placement, insurer negotiations, policy administration, renewals, claims coordination, and relationship management. Participants will explore how brokers and intermediaries can improve decision-making, operational efficiency, market access, and service quality while maintaining strong governance and professional standards.

Particular attention is given to intermediary management, including the selection, segmentation, evaluation, monitoring, and development of intermediary relationships. The program addresses intermediary performance, remuneration and commission structures, conflicts of interest, conduct risks, compliance requirements, documentation, service standards, and the governance mechanisms required to maintain effective and transparent intermediary networks.

The program also explores advanced approaches to portfolio profitability, client retention, insurer and market relationships, operational risk, digital brokerage, data analytics, and performance management. Through case studies, market placement scenarios, intermediary assessments, negotiation exercises, and strategic workshops, participants will develop practical capabilities for managing complex brokerage environments and improving long-term business performance.

Objectives

- By the end of the course, participants will be able to:
- Analyze advanced insurance brokerage business models and intermediary structures.
- Evaluate the strategic role of brokers and intermediaries within insurance distribution.
- Develop intermediary management strategies aligned with organizational objectives.
- Segment and prioritize intermediary relationships according to value, performance, risk, and

strategic importance.

- Establish structured criteria for intermediary selection, appointment, and evaluation.
- Assess intermediary financial, operational, technical, and service capabilities.
- Develop effective governance frameworks for intermediary relationships.
- Manage remuneration, commission, and commercial arrangements appropriately.
- Identify and manage conflicts of interest and intermediary conduct risks.
- Strengthen market placement and insurer negotiation strategies.
- Improve portfolio management, client retention, and renewal performance.
- Evaluate intermediary performance using measurable indicators and service standards.
- Identify operational, regulatory, reputational, and distribution risks.
- Apply data analytics and digital tools to intermediary and brokerage management.
- Strengthen compliance, documentation, transparency, and accountability.
- Develop advanced strategies for sustainable brokerage growth and continuous improvement.

Who Should Attend

This course is designed for senior insurance professionals responsible for brokerage, intermediary management, insurance distribution, market placement, client portfolio management, and business performance. It is particularly relevant to brokerage managers, intermediary relationship managers, distribution managers, insurance account executives, placement specialists, portfolio managers, and senior client servicing professionals.

The program is also suitable for insurance executives and managers responsible for compliance, risk management, governance, finance, operations, claims, underwriting relationships, business development, and distribution strategy. Professionals involved in intermediary appointment, performance monitoring, remuneration, and relationship governance will benefit significantly from the program.

It is particularly relevant to insurance companies, insurance brokers, reinsurance brokers, financial institutions, banks, government entities, corporate insurance departments, and organizations managing complex distribution networks and corporate insurance portfolios.

Learning Outcomes

- By the end of the course, participants will be able to:
- Evaluate the effectiveness of existing brokerage and intermediary operating models.
- Develop intermediary segmentation frameworks based on strategic and commercial value.
- Conduct structured due diligence and capability assessments of intermediaries.
- Establish intermediary appointment and review processes.
- Develop intermediary performance scorecards and monitoring frameworks.
- Assess commission and remuneration arrangements from commercial and governance perspectives.
- Identify conflicts of interest and conduct risks within intermediary relationships.
- Strengthen intermediary governance, accountability, and documentation.
- Develop effective market placement strategies for complex insurance risks.
- Improve negotiation outcomes with insurers and intermediary partners.
- Analyze portfolio performance, retention, profitability, and renewal trends.
- Identify service and operational weaknesses within intermediary networks.
- Develop risk mitigation measures for intermediary-related exposures.
- Use data and analytics to support intermediary performance and portfolio decisions.
- Improve digital workflows and information management across distribution activities.
- Develop an actionable intermediary management and brokerage improvement roadmap.

Course Outline

DAY 01

Advanced Insurance Brokerage Strategy and Intermediary Management

- Evolution of insurance brokerage and intermediary distribution.
- Brokerage business models and strategic positioning.
- Role of intermediaries across the insurance value chain.
- Broker, agent, insurer, client, and other stakeholder relationships.
- Intermediary strategy and distribution objectives.

DAY 01 — CONTINUED

- Intermediary segmentation and strategic classification.
- Assessing intermediary value and business contribution.
- Client portfolio strategy and relationship management.
- Intermediary governance structures.
- Roles, responsibilities, authority, and accountability.
- Building sustainable intermediary relationships.

PRACTICAL APPLICATION

Develop an intermediary segmentation model and assess a portfolio of intermediary relationships according to value, performance, risk, and strategic importance.

DAY 02

Intermediary Selection, Due Diligence, and Performance Management

- Principles of intermediary selection and appointment.
- Intermediary due diligence and background assessment.
- Evaluating financial and operational capability.
- Technical knowledge and insurance market expertise.
- Client servicing capability and service standards.
- Regulatory and compliance assessment.
- Reputation and conduct considerations.
- Intermediary performance criteria.
- Performance scorecards and key indicators.
- Service-level agreements and performance expectations.
- Periodic reviews, remediation, and development plans.
- Intermediary rationalization and relationship optimization.

PRACTICAL APPLICATION

Conduct a structured intermediary assessment and develop a selection and performance scorecard incorporating capability, service, compliance, risk, and commercial criteria.

DAY 03

Market Placement, Commercial Management, and Negotiation

- Advanced insurance placement strategies.
- Structuring complex risk submissions.
- Market access and insurer relationship management.
- Selecting appropriate insurance markets.
- Comparing insurer capacity, coverage, pricing, and terms.
- Managing multiple intermediary and market relationships.
- Negotiating with insurers and distribution partners.
- Commission and remuneration structures.
- Commercial arrangements and transparency.
- Managing conflicts of interest.
- Balancing client interests, insurer relationships, and commercial objectives.
- Documentation and governance of placement decisions.

> **PRACTICAL APPLICATION**
>
> Develop and execute a complex insurance placement strategy involving multiple insurers and intermediary relationships, followed by a commercial negotiation exercise.

DAY 04

Intermediary Risk, Compliance, Governance, and Client Protection

- Intermediary-related operational and distribution risks.
- Regulatory requirements affecting insurance intermediaries.
- Conduct risk and customer protection.
- Conflicts of interest and ethical considerations.
- Commission and remuneration governance.
- Confidentiality and client information protection.
- Documentation and recordkeeping.
- Monitoring intermediary compliance.

DAY 04 — CONTINUED

- Fraud and misrepresentation risks.
- Reputational risks associated with intermediary relationships.
- Internal controls and assurance mechanisms.
- Escalation, remediation, and termination considerations.

PRACTICAL APPLICATION

Analyze a complex intermediary risk case involving compliance gaps, conflicts of interest, documentation weaknesses, and service failures, then develop a governance and remediation plan.

DAY 05

Brokerage Performance, Analytics, Digitalization, and Strategic Improvement

- Advanced brokerage performance management.
- Intermediary portfolio analytics.
- Measuring retention, profitability, growth, placement effectiveness, and service quality.
- Intermediary performance dashboards.
- Management reporting and strategic reviews.
- Identifying high-value and underperforming relationships.
- Digital transformation in insurance distribution.
- Automation of intermediary workflows.
- Data quality and information management.
- Predictive and analytical approaches to intermediary performance.
- Developing intermediary development strategies.
- Continuous improvement and sustainable brokerage growth.

FINAL WORKSHOP

Develop an integrated Advanced Insurance Brokerage & Intermediary Management Strategy covering intermediary segmentation, selection and due diligence, governance, performance management, remuneration, market placement, negotiation, risk and compliance, client protection, analytics, digitalization, and continuous improvement.

Register or Request More Information

Course page: https://quest-training.com/courses/advanced-insurance-brokerage-intermediary-management-training-course
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