Energy Insurance Placement and Claims Management Course

4 – 8 October 2027
San Diego

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Ref: 950_172518 **Date:** 4 – 8 October 2027 **Location:** San Diego **Fees:** 14000 Euro

Overview

Energy Insurance Placement and Claims Management Course is a 1-week course for energy risk, insurance, claims, legal, contract, project, asset, and finance professionals who leave with an Energy Insurance Placement and Claims Playbook. Participants connect construction and operational exposures with coverage, exclusions, limits, retentions, underwriting information, placement decisions, and claim recovery. The course replaces renewal-driven policy review with lifecycle evidence and accountable decisions. Agile Leaders Training Center delivers this course on energy insurance placement and claims management.

Who Should Attend

- Teams responsible for identifying energy asset exposures and arranging risk transfer.
- Functions responsible for policy review, placement, renewal, and insurer communication.
- Groups responsible for claim notification, evidence, quantification, and recovery.
- Project and asset teams responsible for construction and operational risk information.
- Legal, contract, and finance functions responsible for insurance obligations and financial impact.

The course assumes participants can review commercial documents and asset-risk information at work, and leaves out introductory insurance principles and jurisdiction-specific legal advice.

Departments and Industries

The course supports insurance decisions across energy assets and infrastructure projects.

- Risk management, insurance, and claims
- Legal, contracts, procurement, and finance
- Project development, engineering, and asset management
- Oil, gas, power generation, and utilities
- Renewable energy, infrastructure, and industrial services

Learning Objectives

By the end of this course, participants will be able to:

- Analyze construction and operational energy exposures.
- Evaluate coverage, exclusions, limits, and retentions.
- Build an evidence-based underwriting submission.
- Compare programme structures and placement options.
- Apply claim notification, evidence, and quantification controls.
- Prioritize coverage gaps and recovery actions.

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Course Agenda

Day 1: Exposure and Risk Evidence

- Energy Asset and Activity Exposure Map
- Construction-to-Operations Lifecycle Risk Matrix
- Physical Damage and Consequential Loss Scenario Register
- Asset Schedule and Risk Information Checklist
- Insurable and Retained Risk Screening Method

Day 2: Coverage and Exclusions

- Property Damage Coverage Review Worksheet
- Business Interruption Basis and Indemnity Map
- Construction and Erection Risk Policy Interface Matrix
- Liability and Environmental Exposure Coverage Table
- Policy Wording, Warranty, and Exclusion Review Checklist

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Day 3: Programme Design

- Limits, Deductibles, and Retentions Decision Model
- Primary, Excess, Captive, and Reinsurance Layer Map
- Declared Values and Business Interruption Worksheet
- Contractual Insurance Obligation Cross-Check
- Coverage Gap and Policy Interface Register

Day 4: Placement and Claims

- Underwriting Submission Evidence Pack
- Insurance Market Placement and Negotiation Plan
- Loss Notification and Insurer Communication Protocol
- Claim Evidence and Loss Quantification File
- Adjuster Coordination and Settlement Decision Log

Day 5: Placement and Claims Practice

- Suggested Exercise: Energy Exposure and Asset Schedule Review
- Suggested Exercise: Coverage and Exclusion Gap Analysis
- Suggested Exercise: Limits and Retentions Scenario Evaluation
- Suggested Exercise: Claim Notification and Evidence Plan
- Capstone Exercise: Energy Insurance Placement and Claims Playbook

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Practical Exercises

The course uses suggested activities to integrate exposure evidence, programme design, placement, and claims decisions.

- Suggested activity: map construction and operational loss scenarios to insurance information needs.
- Suggested activity: test policy wording, exclusions, limits, and retentions against sample losses.
- Suggested activity: assemble an underwriting submission and placement negotiation plan.
- Suggested activity: organize claim notification, evidence, quantification, and insurer communication.

FAQs

Who suits energy insurance placement and claims management, and what does it assume?

Energy risk, insurance, claims, legal, contract, project, asset, and finance professionals suit the course. It assumes participants can review commercial documents and asset-risk information, while introductory insurance principles and jurisdiction-specific legal advice remain outside scope.

How does energy insurance placement differ from general risk management?

Energy insurance placement converts identified exposures into coverage specifications, underwriting information, limits, retentions, market engagement, and policy wording decisions rather than treating every risk through one general control framework.

Which energy insurance coverage gaps require close review?

Coverage gaps commonly arise at construction-to-operation handover, between property damage and business interruption, across contractor responsibilities, within exclusions and warranties, and where declared values, limits, deductibles, or contractual insurance obligations do not align.

What information supports an energy insurance placement?

An energy insurance placement uses asset schedules, values, process descriptions, loss histories, engineering reports, project contracts, protection measures, business interruption assumptions, risk improvements, and requested coverage terms.

How should an energy insurance claim be prepared?

An energy insurance claim should connect timely notification, policy conditions, cause and damage evidence, mitigation records, repair information, financial quantification, expert inputs, insurer communication, and a documented settlement position.

Conclusion

Participants take back an Energy Insurance Placement and Claims Playbook linking exposures, coverage, programme structure, underwriting evidence, placement strategy, and claim recovery. The playbook improves coordination among risk, insurance, project, legal, asset, and finance functions. It replaces fragmented renewals and claim files with a traceable decision path.