Advanced Professional Liability and Management Liability Training

Professional Development Training Course Outline

Category	Insurance	**Duration**	10 Days
Base Fee	$3,000 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

In today’s volatile business environment, directors, officers, and professionals face increasing scrutiny and exposure to liability. Understanding the nuances of Errors & Omissions (E&O) and Directors & Officers (D&O) Liability—along with management liability trends—is critical for corporate risk mitigation. Training Course on Advanced Professional Liability (E&O/D&O) & Management Liability provides in-depth training on legal, regulatory, and insurance-related exposures, delivering insight into coverage analysis, claims handling, underwriting, and emerging risk factors affecting professionals and corporate leaders globally.

With a surge in cyber risk claims, ESG disclosures, SEC investigations, and regulatory enforcement, it's essential to develop strategic knowledge of policy interpretation, exclusions, defense cost management, and real-world claims scenarios. Whether you’re an insurer, broker, risk manager, legal professional, or compliance officer, this course equips you with advanced strategies, global perspectives, and practical solutions to stay ahead.

Programme Curriculum

Advanced Professional Liability and Management Liability Training Course

Introduction

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Course Objectives

1. Understand the key differences between E&O and D&O liability policies
2. Identify emerging trends in management liability insurance
3. Analyze cyber liability and its intersection with E&O/D&O coverage
4. Interpret claims-made vs. occurrence-based policy structures
5. Evaluate the impact of regulatory investigations on liability coverage
6. Examine ESG (Environmental, Social, Governance) disclosures and exposures
7. Master coverage analysis and policy exclusions
8. Learn best practices for claims notification and defense
9. Mitigate reputational risks and media liability
10. Apply knowledge of international D&O programs and cross-border issues
11. Explore underwriting strategies and pricing models
12. Engage with real-world case studies for application
13. Develop a risk management framework for directors and professionals

Target Audience:

1. Insurance Underwriters
2. Claims Managers
3. Legal and Compliance Officers
4. Corporate Risk Managers
5. Financial Executives and CFOs
6. Insurance Brokers and Consultants
7. Board Members and Directors
8. Senior Management and Executives

Course Duration: 10 days

Course Modules:

Module 1: Overview of Professional Liability

- Definition of E&O and D&O
- Legal origins and evolution
- E&O vs. D&O: Key distinctions
- Historical claims data
- Regulatory bodies and legal context
- **Case Study: E&O Claim from Legal Consulting Firm**

Module 2: Anatomy of D&O Policies

- Key coverage parts (Side A, B, C)
- Insuring clauses
- Claims-made triggers
- Typical exclusions and conditions
- Severability clauses explained
- **Case Study: SEC Investigation & Board Liability**

Module 3: Understanding E&O Exposures

- Industries with high E&O risk
- Risk assessment methods
- Policy drafting tips
- Defense costs management
- Limitation of liability clauses
- **Case Study: Tech Company Sued for Software Failure**

Module 4: Regulatory & Legal Framework

- Global regulatory trends
- Securities litigation impact
- Corporate law and indemnification
- Whistleblower protections
- Investigations and reporting duties
- **Case Study: D&O Claim Triggered by Compliance Breach**

Module 5: Cyber Liability in Management Insurance

- Cybersecurity breaches and claims
- Overlap with D&O and E&O
- Incident response integration
- Underwriting cyber exposures
- Legal ramifications of data leaks
- **Case Study: Ransomware Attack on Financial Institution**

Module 6: ESG & Reputational Risk

- Environmental disclosures and liability
- Social responsibility claims
- Governance and shareholder activism
- Media and reputational risks
- ESG in underwriting and pricing
- **Case Study: ESG Misstatement & Class Action Suit**

Module 7: Claims Management Lifecycle

- From notification to settlement
- Selecting defense counsel
- Coverage position letters
- Cost management strategies
- Dispute resolution techniques
- **Case Study: Professional Services Firm Litigation Timeline**

Module 8: International D&O and Cross-Border Issues

- Local vs. global coverage
- Non-admitted policies
- Territorial limitations
- Global claims handling
- Cultural and legal variances
- **Case Study: Multinational Executive Sued in Two Jurisdictions**

Module 9: Exclusions and Policy Pitfalls

- Most common exclusions
- Intentional acts and fraud

- Prior knowledge conditions
- Contractual liability
- Carve-outs and endorsements
- **Case Study: Denied Coverage Due to Prior Acts**

Module 10: Underwriting & Risk Assessment

- Evaluating board composition
- Financial health metrics
- Past claim history
- Industry risk benchmarking
- Red flag indicators
- **Case Study: Underwriting Failure Leading to Loss**

Module 11: Litigation Trends and Settlements

- Trends in class action suits
- Settlements vs. court rulings
- Legal fees and funding
- Jurisdiction-specific outcomes
- Impact of legal precedent
- **Case Study: High-Profile IPO Suit & Board Settlement**

Module 12: Policy Drafting & Negotiation

- Customized endorsements
- Negotiation strategies
- Broker involvement
- Tail coverage considerations
- Policy renewal techniques
- **Case Study: Policy Gap Led to Denied Claim**

Module 13: Role of Insurance Brokers

- Broker vs. underwriter role
- Client advisory responsibilities
- Communication in claims
- Broker liability exposures
- Broker best practices
- **Case Study: Broker Error & Resulting E&O Suit**

Module 14: Reinsurance and Portfolio Management

- E&O/D&O reinsurance types
- Quota share and excess of loss
- Portfolio risk balancing
- Reinsurer relationships
- Claims aggregation rules
- **Case Study: D&O Reinsurance Dispute Resolution**

Module 15: Risk Mitigation and Governance Strategy

- Risk controls and internal audits
- Director onboarding and training
- Whistleblower hotlines
- Crisis communication protocols

- Continuous improvement processes
- **Case Study: Preventive Measures Averted Major Claim**

Training Methodology:

- Instructor-led live sessions with Q&A
- Interactive case-based workshops
- Group assignments and scenario simulations
- Access to downloadable policy templates and checklists
- Post-session quizzes and final knowledge check

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call *+254769199797*

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	04 Dec 2026	Online	$2,000
23 Nov 2026	04 Dec 2026	Physical	$3,000
23 Nov 2026	04 Dec 2026	Physical	$6,000
23 Nov 2026	04 Dec 2026	Physical	$6,000

Start Date	End Date	Location	Price
23 Nov 2026	04 Dec 2026	Physical	$12,000
23 Nov 2026	04 Dec 2026	Physical	$9,000
23 Nov 2026	04 Dec 2026	Physical	$12,000
23 Nov 2026	04 Dec 2026	Physical	$12,000

Ready to enroll or request a customized program? Book online or contact us:

Register Online Now

Email: info@fineskilltrainingcenter.com | Website: www.fineskilltrainingcenter.com