

**College of Insurance
Insurance Institute of India, Mumbai
Classroom Training Session on Lively Selling of Life Insurance
Program ID – CPL4
(From: 19th to 20th April, 2023)**

Background:-

In fact, selling of life insurance is considered to be most difficult proposition in view of not only the basic nature of product, being intangible, but also insurance being generally considered as last priority amongst basic needs of the individual. Rather many individuals do not consider the same as a need even as one is mentally engaged in fulfilling present needs out of his/her limited resources and so is not interested to think of future needs, especially arising out of unforeseen event of his/her ceasing to exist in this mortal world. The very thought of not being there does not inspire one to go for insurance, rather he/she keeps avoiding the subject and, therefore, a need is felt for someone in between, who has to be after the person to make him/her realize that insurance is also one amongst basic needs of an individual and this someone is known as insurance agent.

There are many insurance agents who sell insurance in quite lively manner and so COI has introduced this two days classroom program where participants can benefit themselves with experience sharing of successful insurance salespersons of different areas as to how they were able to convince the individuals about their need for insurance and how those who were avoiding even to listen to the word "insurance" have not only bought insurance but also became spokesperson for insurance for others, considering the same as social welfare job.

Program Objectives:-

- To learn the basics of insurance selling.
- To learn about the different techniques of insurance selling.
- To understand as to how insurance is close to emotions.
- To learn about the art of patience in insurance selling till the sale finally materializes.
- To learn about various aspects of long term bondage with the one to whom insurance is finally sold.
- To understand various regulations with regard to insurance selling and their rights even after insurance is sold.
- To benefit from experiences of successful insurance salesperson.

Program Contents:-

- Overview of Insurance selling
- How to make insurance selling lively
- Short term & long-term insurance products
- IRDAI Relevant Regulations

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- Understanding Psyche of the prospect
- What differentiates ordinary salesperson from extra ordinary salesperson
- How to win hearts of insured
- Financial & Economic Environment
- Difference between insurance and investment
- Study of how insurance business is different than other businesses where difference between sales and cost is profit.
- Insurance as long term contract
- Insurance Salesperson as foundation stone of the insurance companies
- Experienced Salesperson

Participant's Profile:-

Life Insurance Agents and all those associated in insurance marketing in their various capacities

Course Coordinator:-

Mr B K Unhelkar– 022-26544202 Email: bkunhelkar@iii.org.in

Program Duration & Timing: -

2 days & from 10.30 a.m. to 05.00 p.m.

Course Fees:-

- **Participants requiring residential facilities: Total amount Required –Rs. 11800/- i.e. (Rs. 10000/- plus 9% CGST + 9% SGST).**

The fees cover tuition, course material, A/C single room accommodation in the Institute's campus and full boarding (bed tea/coffee, breakfast, lunch, light refreshments in the evening and dinner). All rooms are fully furnished with attached bathroom and Internet facility.

Rooms are reserved from 12.00 noon onwards the day prior to the commencement of the program. The participants can stay till 12.00 noon next day after the conclusion of the program.

- **Non-residential participants: Total amount Required –Rs. 8496/- i.e. (Rs. 7200/- plus 9% CGST + 9% SGST).**

The fees cover tuition, course material and day boarding (i.e. tea/coffee during tea breaks and lunch for actual days of training).

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Payment Terms and Conditions:-

- 1) The payment should be received by the College of Insurance before the commencement of the program.
- 2) The confirmation of registration for the program will be subject to receipt of payment.
- 3) Please see below details for Bank Transfer.

Name of the Beneficiary	Insurance Institute of India
Account No.	004010100143462
IFS Code	UTIB0000004
MICR Code	400211002
Swift Code	AXISINBB004
Name of Bank	Axis Bank Ltd
Address	Fort Branch, Universal Insurance Building, Ground Floor, Sir P M Road, Fort, Mumbai – 400001.

- 4) For online payment mode by following the below link

https://www.coi.org.in/COI_WebPortal/cmc/regDetails.htm?eventid=1656

Training Venue:-

Please follow below link / QR Code for Training Venue

<https://qrگو.page.link/qs2Qb>



Parking Facility:-

Public parking available at 5 minutes walking distance (Behind US Consulate).

Respond to:-

Ms. M M Satam	college_insurance@iii.org.in	022-26544324
Ms S S Vaidya		022-26544266
Ms A P Dalvi		022-26544254
Mr P M Tare		022-26544251
Ms N B Bagde		022-26544234

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Nomination Form

- 1) Name: _____
- 2) Address: _____

- 3) Educational Qualification: _____
- 4) Date of Birth: _____
- 5) Position Held.: _____
- 6) Mobile No : _____
- 7) Telephone No. : _____
- 8) E-Mail: _____
- 9) Alternate E-Mail: _____
- 10) Sponsoring Organisation: _____

Please affix
your
photograph
here

- 11) Food preference: Vegetarian Non-Vegetarian
- 12) Accommodation Required: Yes No

- 13) Details of Fee Paid: Cheque / D.D. No. _____ dt. _____
Drawn on _____ Bank, for Rs. _____

Signature & seal of the authority
of the Sponsoring organisation

Signature of the Participant

*Name of Co-ordinator: _____

Mobile No: _____ Tel. No.: _____

Email-Id.: _____ Company Name: _____

*This column is mandatory for those participants who are sponsored by company.