

**Insurance Institute of India,
College of Insurance, Mumbai**
**Classroom Training Session on Customer Engagement and
Retention in Insurance Industry (CT-CE&RII)**
Program ID – CPG20 (From: 7th to 8th September, 2022)

Relevance of the Program:-

Peter Drucker said that the purpose of a business was to create a customer. Companies can do that only when they are able to create, communicate and deliver unique customer value proposition that provide a compelling resource to the question, 'why should I buy and keep buying'. This logic applies to Insurance Companies as much as to other organizations. In recent years, Insurance business has been facing serious challenges in the form of reluctance to buy as well as attrition in the form of a lapsation and withdrawal of policies.

Part of the solution may lie in improving service levels of the Companies, particularly the use of information technology tools to provide convenience and seamless service. While this can help to enhance Customer Satisfaction, it is no guarantee of Customer loyalty. The latter is found to reside in an Insurer's Capacity to create a 'wow' experience through strategic interventions that encompass Functionality + Service + Relationship + Customer Engagement. This would also call for insurer to relook at how they organize and empower their front end customer representative to create breakthrough 'Moment of Truth' for their customer.

Program Objectives:-

The program on Customer Engagement and Retention in Insurance Industry is designed to sensitize and equip manager and executives in front end operation of Insurance Companies and marketing intermediaries to understand the nuances and distinctive elements involved in creating such moments.

Program Content:-

- ❖ Customer Experience Management and its element in Life Insurance Industry.
- ❖ Customer Service and Grievance Redressed in Life Insurance.
- ❖ Customer Relationship Management and engagement – Emerging Perspective.
- ❖ Organizing and empowering for achieving customer breakthroughs.

Participant's Profile:-

Executives working in Insurance Companies, Broker Firms and Specified Persons from Banks, Corporate Agents, etc.

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Course Coordinator:-

Mr. Krishnamohan Y, Faculty , +91 8879688027

Email: ykmohan@iii.org.in

Program Duration & Timing: -

2 days & from 10.00 a.m. to 04.30 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).

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.

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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/eventDetails?eventid=1564

Training Venue:-

Please follow below link / QR Code for Training Venue

<https://qrgo.page.link/qs2Qb>



Parking Facility:-

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

Respond to:-

Ms. Tanuja S Jagavkar	college_insurance@iii.org.in	022-26544216
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.**