

**College of Insurance**  
**Insurance Institute of India, Mumbai**  
**Classroom Training Session on Achieving Operational**  
**Excellence in Customer Service in Life Insurance- CT**  
**Program ID – CPL5**  
**(From: 24<sup>th</sup> to 25<sup>th</sup> April, 2023)**

**Background:-**

A company's brand is not its slogan. It is a feeling, often a set of values—it's the CORE that makes a company memorable and differentiated in the competition. Brand is often summarized as a company's promise to its customers. This is all the most important for a life Insurance company as the Life Insurance product is an Intangible in nature, hence earning the brand image is an essential ingredient for achieving a competitive edge.

Customer service brings a company's core values to life by demonstrating them through each customer touch point. A company's core values that differentiate a company and give it an identity. "Well-defined behaviours" are branded content, phrases and resources that associates can use in specific customer interactions. Adapting is key, because it's what transforms your brand from an abstract, one-size-fits-all concept into a meaningful way to connect with each customer.

The new age customers don't trust easily any catch phrase, tagline. With Facebook and Twitter at a click, they're quick to point out when companies fail to meet their expectations. That's why the best companies demonstrate who they are through every interaction.

IN this back ground I had created a program with the following objectives:

- How brands work for the buyer
- Various ways of Interactions with customer
- Influencing the Customer with service standards
- Customer Experience and how to create the WOW feelingS

The TOPICs and the TAKE AWAY from the program

S.No	TOPIC	TAKE-AWAY
1	Brand & the Buyer	What brand means for a customer-How it influence the buyer behaviour
2	The Customer Experience-CX	Who are our customers? What is customer service, The service providers and the customer perceptions, empathising the customer, Customer touch point's vs a vs train points, the Customer journey, All is well that ends well-CASE STUDY
3	Interaction with Customers through tele-calling	The positives and negatives of a tele-calling. It limitations. The telephone talking etiquette. Objection handling while on call. The 3F model-CASE STUDY

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4	Customer Interaction Face to Face	The duck and mail requests, prioritising the requests. Listening, the communication with the customer the tone-CASE STUDY
5	The customer service-the repeat sale	Customer Experience- reduction in lapsation, repeat business opportunity-CASE STUDY
6	The WOW feeling for the customer	Anchoring of self for a WOW feeling of customer. The TIPs, How the Operational Excellence transforms the customer and build future generation of customers-CASE STUDY

**Participant's Profile:-**

This program is intended for the operations executives, Managers and senior managers of Life Insurance companies, Corporate agents, Broking companies

**Course Coordinator:-**

Mr Krishnamohan Y– 022-26544209      Email: [ymohan@iii.org.in](mailto:ymohan@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=1658](https://www.coi.org.in/COI_WebPortal/cmc/regDetails.htm?eventid=1658)

**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. M M Satam	<a href="mailto:college_insurance@iii.org.in">college_insurance@iii.org.in</a>	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.