

College of Insurance
Insurance Institute of India, Mumbai
Insurance Marketing for Corporate Agents
Program ID: CPL1
(From: 22nd to 23rd April, 2019)

Relevance of the Program:-

If one looks at insurance distribution through Corporate Agents (including banks') Banks have emerged as a major channel in garnering New Business Premiums for private sector insurance companies in India. They contributed 53% of new business premiums [against 30% for Agency] for private life insurance companies [IRDA Annual Report 2016-17]. Insurance distribution has provided them a way to earn huge fee based income through leveraging their branch network, relations and goodwill via cross – selling.

The specified persons in banks and corporate agents [designated and licensed to sell insurance by law] have some advantages over other channels [like agency and direct sales]. They have better opportunity to build a natural and regular connect with customers who know them and need them for various banking and other services. The branch network enables wide reach and spread that can be leveraged to generate substantial fee income by way of commission. These factors in themselves, may not however ensure success. Sales infrastructure needs to be converted into selling competence via suitable learning interventions that empower the specified persons in banks and corporate agents to play a more effective role. The specified sales persons face many issue and challenges like confusion about their role in selling insurance, mandates from the regulator. Their role as a primary underwriter and in customer service and finally how to market insurance electively.

Insurance Institute of India, the premier body for insurance education in India and other third world markets, has developed numerous insights, through research and study as well as in the course of its rich engagement on multiple platforms, with both banks / insurance companies, and their constituents. College of Insurance, the training arm of the institute is happy to announce a comprehensive three day programme that has been designed to build capacity and empower your Specified Persons towards achieving success in the marketing of insurance

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products. The session will be conducted by faculty who combine a rich blend of academic rigour with many decades of practical experience in multiple functions of insurance.

Program Content:-

- Corporate Agency Channel : concepts, rationale and emerging vistas
- Similarities, distinctions and synergies between banking, insurance and financial markets
- Understanding regulatory provisions and their implications and their compliance implications for specified persons in the bank and Corporate agency
- How insurance adds value in the personal financial planning context – its core value proposition and positioning in the individual's wealth portfolio
- Why people buy insurance : an exploration into the core drivers underlying buyer behavior in Insurance [separate for life, general and health insurance products]
- Life insurance and pensions: an understanding of the various generic products [traditional and non-traditional, features and benefits, their positioning.
- Challenges in marketing and selling life insurance and pensions in the contemporary context – how to address these
- Coverage, issues and challenges in sales and service of general and health insurance with specific focus on following lines of business
 - Health Insurance
 - Long Term Home Insurance policies
 - Individual Personal Accident policies
 - Motor insurance
- Insurance underwriting : an appreciation of the mandated role of specified person as a primary underwriter
- Insurance claims administration and policy servicing – an appreciation of the specified

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person's role

- Connecting to customers: breakthrough insights drawn from global best practice of top insurance producers [in particular, we refer to MDRT s, COT s and TOT s].
- Customer relationship Management and Insurance : emerging insights for 21st century organizations
- Personal Branding

Participant Profile:-

- Corporate Agents including Banks' specified persons dealing with the marketing of insurance products.

Timing : 10.00 a.m. to 05.00 p.m.

Enrolment:-

To enrol for the training program please download the enrolment form and after filling in the necessary details submit your form and fees to the office of Insurance Institute of India, Plot C-46, G-Block, Near Dhirubhai Ambani International School, Bandra-Kurla Complex, Bandra (East), Mumbai – 400 051 by **15th April, 2019**

You can also do online enrolment through College of Insurance's website www.coi.org.in on or before **15th April, 2019**.

Program Duration: - 2 days from 22nd to 23rd April, 2019

Course Fees:-

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Participants requiring residential facilities: Total amount Required –Rs. 10148-i.e. (Rs. 8600/- 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. 7316/-i.e. (Rs. 6200/- 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.
- 3) We do not consider any refund request or adjustment of fees against future programs in case of non attendance.
- 4) Fees should be paid by Demand Draft drawn in favour of "Insurance Institute of India" payable at Mumbai and forward it together with the "Enrolment form" available from College of Insurance's website www.coi.org.in or by online payment mode by following the below link <http://www.coi.org.in/web/guest/programme-calendar>

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Please follow below link for Training Venue

<https://www.google.com/maps/place/Insurance+Institute+of+India/@19.0636539,72.8670136,17z/data=!4m5!3m4!1s0x3be7c8ea29ccf0a5:0x8d0e92854f4dae94!8m2!3d19.0636488!4d72.8692023>

 **Parking Facility:**

"VEHICLE PARKING IS NOT ALLOWED IN OUR CAMPUS".

Course Co-ordinator:

Prof Archana Vaze – 022-26544286 Email: vaze@iii.org.in

Respond to :-

Mr D V Govekar	college_insurance@iii.org.in	022-26544247
Ms S S Vaidya		022-26544266
Ms A P Dalvi		022-26544254
Mr P M Tare		022-26544251

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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: _____

11) Food preference: Vegetarian Non-Vegetarian

12) Hostel Facility Required: Yes No

13) Details of Fee Paid: Cheque / D.D. No. _____ dt. _____

Drawn on _____ Bank, for Rs. _____

Please
affix your
photograph
here

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.