

# **CERTIFICATE PROGRAMME IN ADVANCED INSURANCE MARKETING**

**Note: Candidates passed** Licentiate (Life or Non-Life) with the Graduation in any stream or Associate (AIII) or Fellow (FIII) are **eligible for Certificate Programme In Advanced Insurance Marketing.**

## **BASIC LEVEL**

### **CPAIM – BL01:- Fundamentals of Insurance**

(Year of Edition: 2012)

#### **Contents**

**Chapter 1: Introduction To Risk And Insurance.**

**Chapter 2: Risk Management And Insurance.**

**Chapter 3: Principles Of General Insurance.**

**Chapter 4: Life Insurance – An Introduction.**

**Chapter 5: Principles Of Life Insurance: Premiums.**

**Chapter 6: Principles Of Life Insurance: Profit And Returns.**

**Chapter 7: Legal Foundation Of Insurance.**

**Chapter 8: Pension Health And Group Insurance.**

**Chapter 9: The Financial Market Place And Insurance.**

**Chapter 10: Insurance: The Changing Context**

## **CPAIM – BL02:- Personal Financial Planning**

(Year of Edition: 2012)

### **Contents**

***Chapter 1: Basics Of Financial Planning.***

***Chapter 2: Risk And Return.***

***Chapter 3: Portfolio Management.***

***Chapter 4: Investment Vehicles.***

***Chapter 5: Retirement Planning.***

***Chapter 6: Risk Management And Insurance Planning.***

***Chapter 7: Estate Planning.***

***Chapter 8: Tax Planning.***



## **CPAIM – BL03:- Professional Selling**

(Year of Edition: 2012)

### **Contents**

***Chapter 1: The Selling Profession.***

***Chapter 2: Selling And Marketing.***

***Chapter 3: The Philosophy Of Selling And Marketing.***

***Chapter 4: Approaches To Selling Insurance.***

***Chapter 5: Exploring The Market.***

***Chapter 6: Prospecting.***

***Chapter 7: Getting The Appointment For A Sales Interview.***

***Chapter 8: The Sales Interview.***

***Chapter 9: Presenting The Solutions.***

***Chapter 10: Objections Handling.***

***Chapter 11: The Close.***

***Chapter 12: Continuing The Relationship.***

***Chapter 13: The Disciplines Of Selling.***

***Chapter 14: The Karma And The Dharma Of Selling.***

***Chapter 15: Insight Marketing of A Successful Insurance Sales –Person.***

## **IC 02 - Practice of Life Insurance**

(Year of Edition: 2011)

### **Contents**

***Chapter 1: Practice Of Life Insurance***

***Chapter 2: Premiums And Bonuses***

***Chapter 3: Plans Of Life Insurance***

***Chapter 4: Annuities***

***Chapter 5: Group Insurance***

***Chapter 6: Linked Life Insurance Policies***

***Chapter 7: Applications And Acceptance***

***Chapter 8: Policy Documents***

***Chapter 9: Premium Payment, Policy Lapse And Revival***

***Chapter 10: Assignment, Nomination And Surrender Of Policy***

***Chapter 11: Policy Claims***



## **IC 11 - Practice of General Insurance**

(Year of Edition: 2011)

### **Contents**

***Chapter 1: Introduction to General Insurance.***

***Chapter 2: Policy Documents and Forms.***

***Chapter 3: Fire and Marine Insurance.***

***Chapter 4: Motor Insurance and Personal Liability Insurance.***

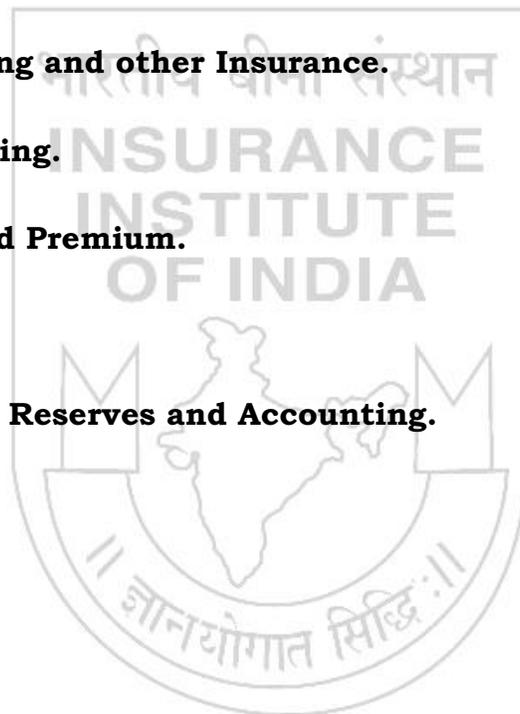
***Chapter 5: Engineering and other Insurance.***

***Chapter 6: Underwriting.***

***Chapter 7: Rating and Premium.***

***Chapter 8: Claims.***

***Chapter 9: Insurance Reserves and Accounting.***



# **CERTIFICATE PROGRAMME IN ADVANCED INSURANCE MARKETING**

## **INTERMEDIATE LEVEL**

### **CPAIM – IL01:- Insurance and the Environment**

(Year of Edition: 2013)

### **Contents**

***Chapter 1: The Business Organisation And Its Environment.***

***Chapter 2: Foundations Of Economics – Macro Economics.***

***Chapter 3: Microeconomic Analysis And The Firm.***

***Chapter 4: Role Of Government And Economic Planning.***

***Chapter 5: Macroeconomic Indicators And Business Environment***

***Chapter 6: Economic Reforms: Liberalisation, Privatisation And Globalisation.***

***Chapter 7: Fiscal And Monetary Policy.***

***Chapter 8: External Sector - Foreign Trade.***

***Chapter 9: Financial Markets And The Economic Environment.***

***Chapter 10: Global Trends In The Insurance Industry***

## **CPAIM – ILO2:- Understanding Buyer Behaviour**

(Year of Edition: 2013)

### **Contents**

**Chapter 1: Introduction To Consumer Behaviour.**

**Chapter 2: Market Segmentation, Targeting And Positioning.**

**Chapter 3: Cultural & Environmental Influences On Consumer Behaviour.**

**Chapter 4: Family Influences & Decision Making.**

**Chapter 5: Opinion Leadership And Diffusion Of Innovations.**

**Chapter 6: Motivation.**

**Chapter 7: Perception.**

**Chapter 8: Consumer Decision Making Process.**

**Chapter 9: Role Of Research In Understanding Consumer Behaviour.**

**Chapter 10: Epilogue – The Mega Morphing Of The Indian Consumer  
Since Maruti 800**

## **CPAIM – ILO3:- Agency Management**

**(Year of Edition: 2013)**

### **Contents**

***Chapter 1: The Need For Agency Management.***

***Chapter 2: Managing The Sales Process.***

***Chapter 3: The Agency Model.***

***Chapter 4: The Agent And His Role.***

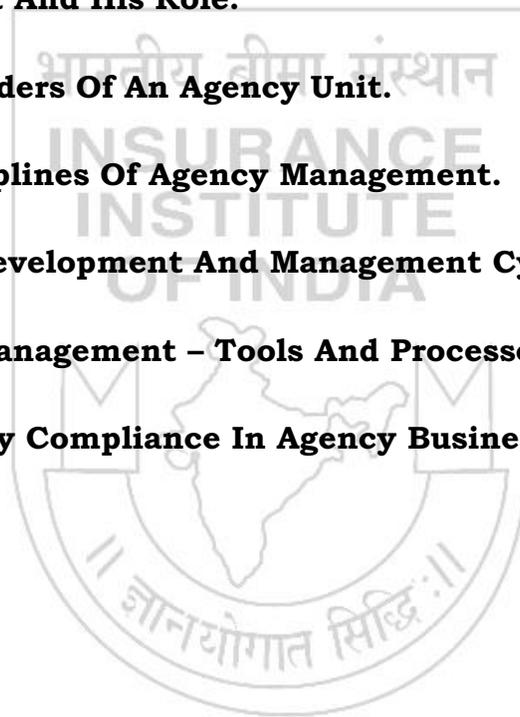
***Chapter 5: Stake Holders Of An Agency Unit.***

***Chapter 6: The Disciplines Of Agency Management.***

***Chapter 7: Agency Development And Management Cycle.***

***Chapter 8: Agency Management – Tools And Processes.***

***Chapter 9: Regulatory Compliance In Agency Business Of Life Insurance.***



# **CPAIM – ILO4:- Indian Insurance Industry**

**(Year of Edition: 2013)**

## **Contents**

***Chapter 1: Early Days.***

***Chapter 2: Evolution Of Insurance In India.***

***Chapter 3: Life Insurance – Nationalised.***

***Chapter 4: General Insurance Nationalised.***

***Chapter 5: Economic Reforms.***

***Chapter 6: Reforms In The Insurance Sector.***

***Chapter 7: Progress Since 2000.***

***Chapter 8: Other Institutions And Laws***



## **IC 22 - Life Insurance Underwriting**

(Year of Edition: 2012)

### **Contents**

***Chapter 1: Life Underwriting-Principles & Concepts (Part-1)***

***Chapter 2: Life Underwriting - Principles & Concepts (Part-2).***

***Chapter 3: Underwriting: Structure And Process.***

***Chapter 4: Financial Underwriting.***

***Chapter 5: Occupational, Avocational And Residential Risks.***

***Chapter 6: Reinsurance.***

***Chapter 7: Blood Disorders.***

***Chapter 8: Nervous System.***

***Chapter 9: Diabetes Mellitus.***

***Chapter 10: Thyroid Diseases.***

***Chapter 11: Urinary System.***

***Chapter 12: The Respiratory System.***

***Chapter 13: Gastrointestinal (Digestive) System.***

***Chapter 14: Cardiovascular System.***

***Chapter 15: Special Senses: Disorders Of The Eyes, Ears And Nose: Eye.***

***Chapter 16: Glossary***

# **IC 45 - General Insurance Underwriting**

(Year of Edition: 2012)

## **Contents**

***Chapter 1: Introduction To Underwriting.***

***Chapter 2: Methodology & Procedures Of Underwriting.***

***Chapter 3: Principles Of Rate Making.***

***Chapter 4: Rating Approaches In Pricing.***

***Chapter 5: File & Use Regulations.***

***Chapter 6: Applications Of File & Use Regulations.***

***Chapter 7: Tools Of Underwriting.***

***Chapter 8: Types Of Policies.***

***Chapter 9: Underwriting Profitability & Review Strategies.***

***Chapter 10: Protection Of Policyholder's Interest.***

***Chapter 11: Research & Development In Underwriting, Rating & Product Innovation – Challenges Ahead.***

***Chapter 12: It. Applications In Underwriting.***

***Chapter 13: Glossary Of Terms.***

## **Optional stream –Life**

### **CPAIM – IL06 (i):- Life Insurance Products**

**(Year of Edition: 2013)**

## **Contents**

***Chapter 1: Life Insurance Products – An Overview.***

***Chapter 2: The Underlying Concepts In Life Insurance Products.***

***Chapter 3: Necessity, Wants And Needs.***

***Chapter 4: Life Insurance: A Complete Life-Stage Financial Planning Tool.***

***Chapter 5: Other Contingencies And Products.***

***Chapter 6: Life Insurance Vs. Other Financial Products.***

***Chapter 7: Life Insurance Product Development.***

***Chapter 8: Takaful (Islamic Insurance).***



**CPAIM – ILO6 (ii):- Pensions and Annuities**  
**(Year of Edition: 2013)**

**Contents**

***Chapter 1: Need For Old Age Income Security.***

***Chapter 2:Annuity Fundamentals.***

***Chapter 3: Corporate Pension And Annuity Products.***

***Chapter 4:Voluntary Pensions.***

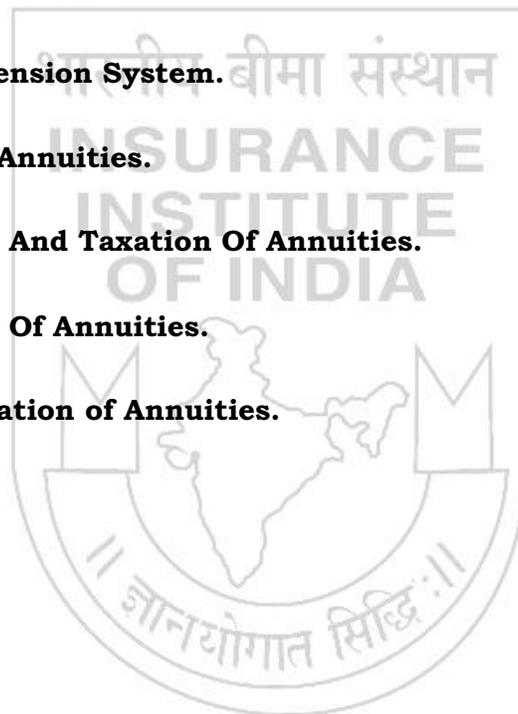
***Chapter 5:The New Pension System.***

***Chapter 6:Pricing Of Annuities.***

***Chapter 7:Regulation And Taxation Of Annuities.***

***Chapter 8: Marketing Of Annuities.***

***Chapter 9: Administration of Annuities.***



## **IC 27 - Health Insurance**

**(Year of Edition: 2013)**

### **Contents**

***Chapter 1: Introduction To Health Insurance.***

***Chapter 2: Health Financing Models And Health Financing In India.***

***Chapter 3: Health Insurance Products In India.***

***Chapter 4: Health Insurance Underwriting.***

***Chapter 5: Health Insurance Policy Forms And Clauses.***

***Chapter 6: Health Insurance Data, Pricing & Reserving.***

***Chapter 7: Regulatory And Legal Aspects Of Health Insurance.***

***Chapter 8: Customer Service In Health Insurance.***

***Chapter 9: Health Insurance Fraud.***

***Chapter 10: Reinsurance.***



**IC 99 - Asset Management**  
**(Year of Edition 2005)**

**Contents**

***Chapter 1: Asset Management.***

***Chapter 2: Bond Valuation.***

***Chapter 3: Equity Valuation.***

***Chapter 4: Securities.***

***Chapter 5: Risk.***

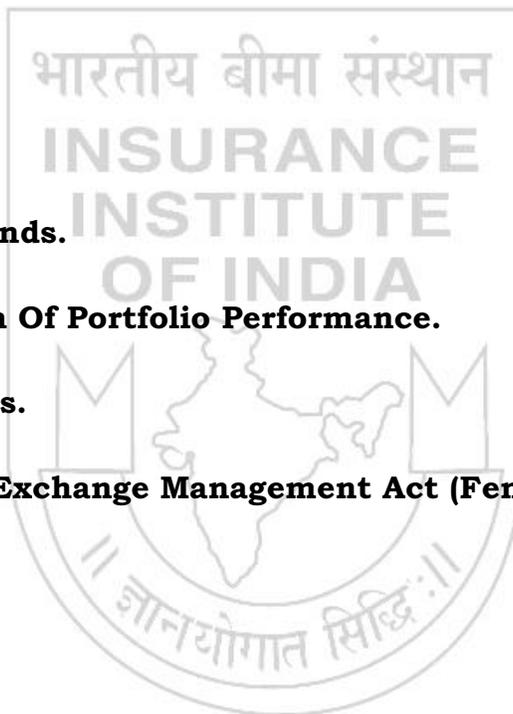
***Chapter 6: Portfolio.***

***Chapter 7: Mutual Funds.***

***Chapter 8: Evaluation Of Portfolio Performance.***

***Chapter 9: Derivatives.***

***Chapter 10: Foreign Exchange Management Act (Fema).***



## **Optional stream – General**

### **IC 78 - Miscellaneous Insurance**

**(Year of Edition: 2013)**

## **Contents**

***Chapter 1: Personal Accident Insurance***

***Chapter 2: Introduction To Health Insurance.***

***Chapter 3: Overseas Health Insurance***

***Chapter 4: Burglary Insurance.***

***Chapter 5: Money Insurance.***

***Chapter 6: Fidelity Insurance.***

***Chapter 7: Bankers Indemnity And Jeweller's Block Insurance.***

***Chapter 8: Other Miscellaneous Insurances.***

***Chapter 9: Package Covers.***

***Chapter 10: Specialized Covers – The New Trend.***

***Chapter 11: Reinsurance.***

***Chapter 12: Rural Insurances 1.***

***Chapter 13: Rural Insurances 2.***



**IC57 -Fire and Consequential loss Insurance**  
(Year of Edition: 2015)

**Contents**

***Chapter 1: Basic Principles & The Fire Policy.***

***Chapter 2: Add On Covers & Special Policies.***

***Chapter 3: Fire Hazards And Fire Prevention.***

***Chapter 4: Erstwhile Tariff Rules & Rating.***

***Chapter 5: Documents.***

***Chapter 6: Underwriting.***

***Chapter 7: Claims Legal Aspects.***

***Chapter 8: Claims Procedural Aspects.***

***Chapter 9: Consequential Loss Insurance 1.***

***Chapter 10: Consequential Loss Insurance 2.***

***Chapter 11: Specialised Policies & Overseas Practice.***



## **IC 67 - Marine Insurance**

**(Year of Edition: 2013)**

### **Contents**

***Chapter 1: Basic Concepts.***

***Chapter 2: Fundamental Principles.***

***Chapter 3: Arranging For Insurance (Cargo) L.***

***Chapter 4: Cargo Insurance Coverage's.***

***Chapter 5: Cargo Insurance Coverage's***

***Chapter 6: Types Of Covers.***

***Chapter 7: Hull Insurance-Part 1.***

***Chapter 8: Hull Insurance-Part 2.***

***Chapter 9: Marine Claims.***

***Chapter 10: Marine Recoveries.***

***Chapter 11: Role Of Banker's In Marine Insurance.***

***Chapter 12: Loss Prevention, Reinsurance, Maritime Frauds.***

# **IC 72 - MOTOR INSURANCE**

(Year of Edition: 2015)

## **Contents**

### **Part I: Own Damage Insurance**

**Chapter 1: Introduction to Motor Insurance**

**Chapter 2: Marketing in Motor Insurance**

**Chapter 3: Type of motor vehicles, documents and policies**

**Chapter 4: Underwriting in Motor Insurance**

**Chapter 5: Motor Insurance Claims**

**Chapter 6: IT Applications in Motor Insurance**

**Chapter 7: Consumer Delight**

### **Part II: Motor Third Party Insurance**

**Chapter 8: Third Party Liability Insurance**

**Chapter 9: Procedures For Filing And Defending**

**Chapter 10: Quantum Fixation**

**Chapter 11: Fraud Management and Internal Audit**

**Annexure A: Legal aspects of Third party claims**

**Annexure B: Important Decisions on Motor Vehicle Act**

# **CERTIFICATE PROGRAMME IN ADVANCED INSURANCE MARKETING**

## **ADVANCED LEVEL**

### **CPAIM – AL01:- INSURANCE MARKETING - PRINCIPLES & PRACTICES**

(Year of Edition: 2015)

### **Contents**

- 
- Chapter 1: Marketing Basics.**
- Chapter 2: Planning For Marketing.**
- Chapter 3: Corporate Marketing Strategy.**
- Chapter 4: Organising, Implementing And Controlling Marketing Activities.**
- Chapter 5: Marketing Information System.**
- Chapter 6: Marketing Research.**
- Chapter 7: Consumer Behaviour.**
- Chapter 8: Segmentation Targeting Positioning.**
- Chapter 9: Product And Services.**
- Chapter 10: New Product Development.**
- Chapter 11: Pricing Financial Products.**
- Chapter 12: Distribution Systems And Channels.**
- Chapter 13: Marketing Communication.**
- Chapter 14: Personal Selling And Sales Promotion.**

**Chapter 15: Advertising And Publicity.**

**Chapter 16: Customer Service Management**

**Chapter 17: Customer Relationship Management**



## **CPAIM – AL02:- LEADERSHIP AND PERSONAL MASTERY**

(Year of Edition: 2015)

### **Contents**

**Chapter 1: Managers And Leaders.**

**Chapter 2: An Introduction To Management Thought.**

**Chapter 3: Functions Of Management.**

**Chapter 4: Human Resources Management- Concept And Practice.**

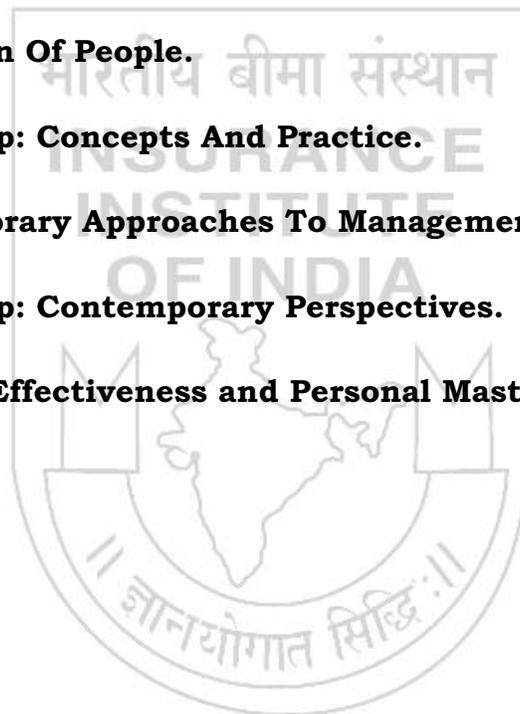
**Chapter 5: Motivation Of People.**

**Chapter 6: Leadership: Concepts And Practice.**

**Chapter 7: Contemporary Approaches To Management.**

**Chapter 8: Leadership: Contemporary Perspectives.**

**Chapter 9: Personal Effectiveness and Personal Mastery.**



# **CPAIM –AL 03 – BRANDING AND MARKETING COMMUNICATION**

(Year of Edition: 2015)

## **Contents**

***Chapter 1: Branding: An Introduction.***

***Chapter 2: What is a Brand.***

***Chapter 3: The Magic of A Name.***

***Chapter 4: Planning and Strategy.***

***Chapter 5: Branding Values.***

***Chapter 6: Brand Positioning.***

***Chapter 7: Brand Identity, Brand Image and Brand Personality.***

***Chapter 8: Brand Extension.***

***Chapter 9: Managing a Brand.***

***Chapter 10: Brand Building.***

***Chapter 11: Keeping Brands alive.***



## **CPAIM –AL 04 – MARKETING CHANNELS IN INSURANCE**

(Year of Edition: 2015)

### **Contents**

***Chapter 1: Understanding Distribution Channels – Concept & its Progress.***

***Chapter 2: Channel Mix Decisions and the criticality of a distribution strategy.***

***Chapter 3: Understanding Distribution Channels in Insurance – their Merits and Demerits.***

***Chapter 4: Regulatory Aspects of Different Distribution Channels.***

***Chapter 5: Creating Customer Value through Distribution.***

***Chapter 6: Unique Aspects of Insurance Distribution.***

***Chapter 7: Customer Relationship Management through Distribution.***

***Chapter 8: Customer Relationship Management through Distribution.***

***Chapter 9: Stop Press – Latest Developments in Insurance Distribution.***

## **CPAIM –AL 05 – Marketing Research And Insurance**

(Year of Edition: 2015)

### **Contents**

***Chapter 1: Introduction - Importance Of Marketing Research To Managerial Decisions.***

***Chapter 2: Marketing Research And Information Systems.***

***Chapter 3: Applications Of Marketing Research In Different Areas Of Marketing.***

***Chapter 4: Research Methodology.***

***Chapter 5: The Marketing Research Process.***

***Chapter 6: Defining The Research Problem.***

***Chapter 7: Designing The Objectives And Setting The Hypothesis, Information Areas.***

***Chapter 8: Reviewing The Literature.***

***Chapter 9: Research Design.***

***Chapter 10: Sampling.***

***Chapter 11: Methods Of Data Collection.***

***Chapter 12: Measurement And Scaling Techniques.***

***Chapter 13: Basics Of Statistics – Statistical Methods For Research.***

***Chapter 14: Analysis – Hypothesis Testing.***

***Chapter 15: Advanced Statistical Techniques For Marketing Research – Spps.***

***Chapter 16: Report Writing.***

**Chapter 17: Application Of Marketing Research – Additional Cases And  
Research Skill Application Exercise**

**Updated on 17.02.2018**

