

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.

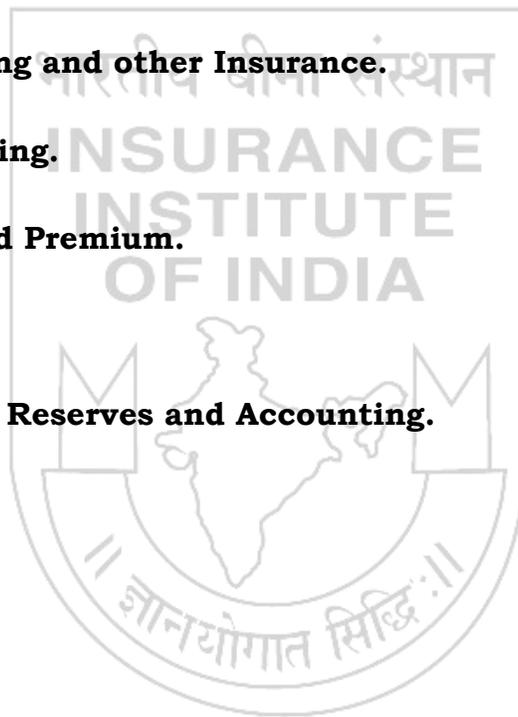
Chapter 5: Engineering and other Insurance.

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.

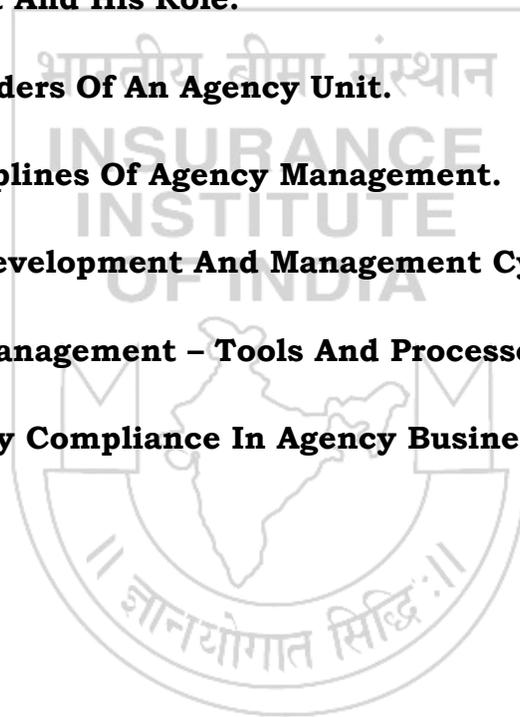
Chapter 5: Stake Holders Of An Agency Unit.

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.

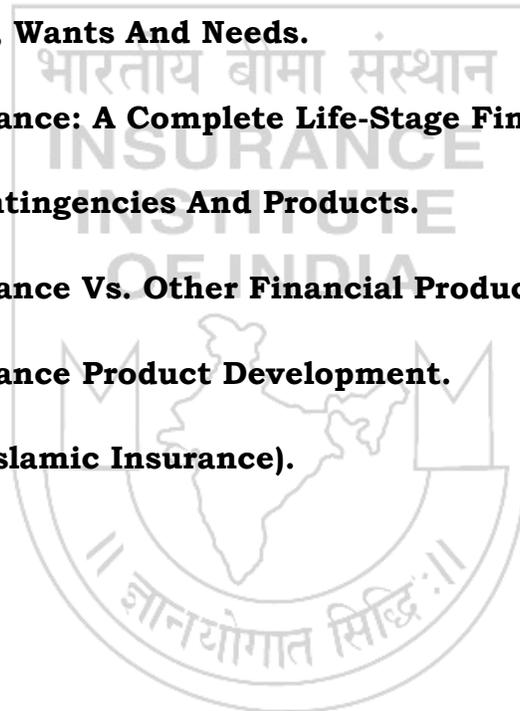
Chapter 4: Life Insurance: A Complete Life-Stage Financial Planning Tool.

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.

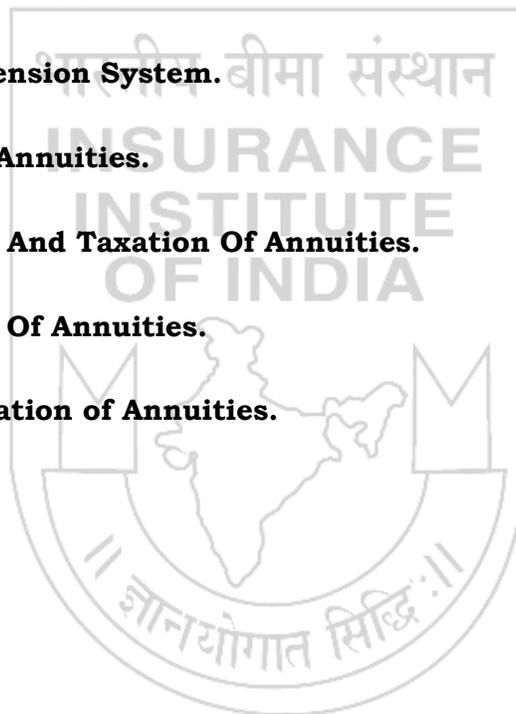
Chapter 5:The New Pension System.

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.

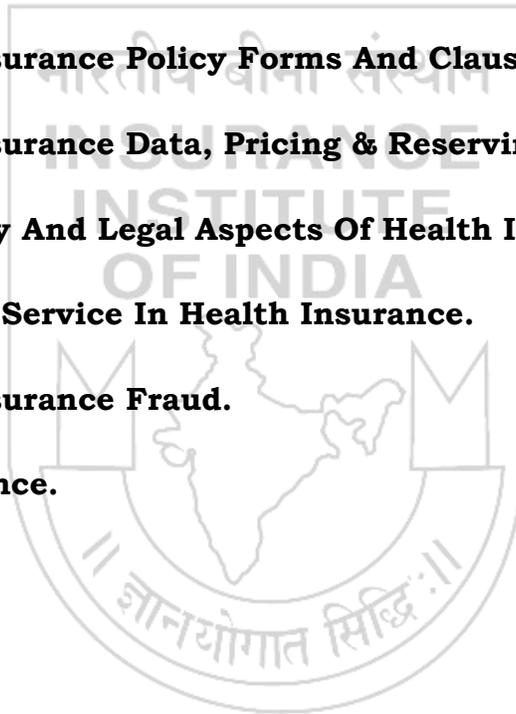
Chapter 6: Health Insurance Data, Pricing & Reserving.

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.

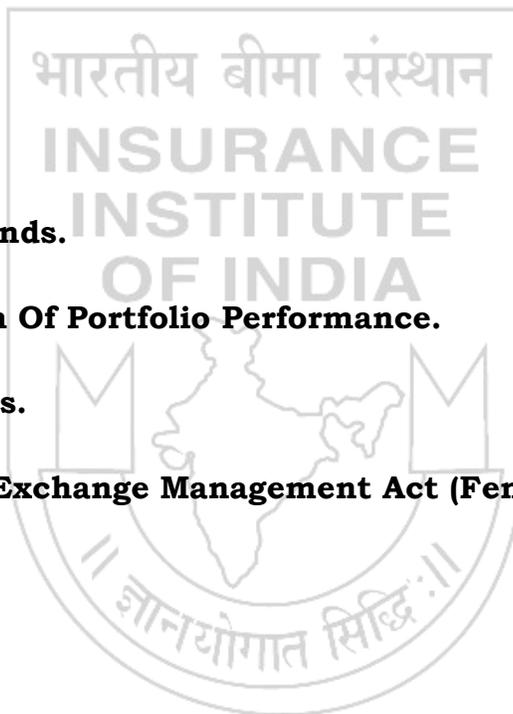
Chapter 6: Portfolio.

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 AND THE ENVIRONMENT

(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.

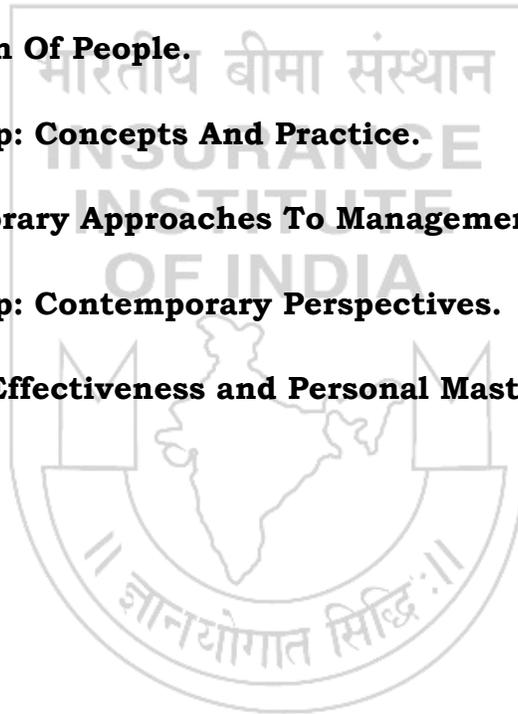
Chapter 5: Motivation Of People.

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 18.07.2016

