

College of Insurance
Insurance Institute of India, Mumbai
Classroom Training Session on Suitability Assessment and
Product Recommendation ID – CPL12
(From: 29th to 30th May, 2023)

Background:-

Selling insurance is unlike selling FMCG product or service as, buyers can't see, touch, smell or feel this product/service. Our Life Insurance advisors are all the while selling the Life Insurance products encashing the fears of the buyers. The sale becomes increasingly complex when they are approaching the new generations that would want to buy everything just by a clicking a button.

It's up to Life Insurance advisors to convert these highly complex buyers into clients. This is possible when advisor converts the transactional approach to a process approach of creating rapport and earning the trust of these buyers. This is not only an advantage for the client but more often than not, an advantage for the Life Insurance companies

Through this program we ensure that Life Insurance advisor learn the skills of connecting with prospects, by getting the appointments, and lead conversations with prospects by asking leading questions to understand the insurance needs of the prospect. In this way the advisor ends up with offering a solution to the need rather than trying to sell a policy- which is transactional. This creates a cutting edge for your company and your advisor in the cut throat competitive insurance market.

The modules of learning in this program are

S No	TOPICS	TAKE AWAYS
1	What is selling and Need based Selling	The Life Insurance products, Unique features; Selling process, types of selling: Want based and Need based selling: Life Insurance- a solution set and not a product-Portfolio management concepts. Regulatory provisions on Need Analysis and Fact Find
2	Building Rapport with prospect	Skill building on Tele calling for fixing appointments, The face to face meeting etiquette. Leading discussion with prospect, Probing skills with suitable questions and leading the discussion.
3	Objection Handling	Objections are welcome. The Objection handling techniques. Making an emotional connect with the prospect by clearing the cobwebs in the mind of the prospect
4	Closing the Sale and After	Closing Techniques-Why Closing is a skill, How to master it. Asking for referrals, Appointment for meeting next time. Building trust-Converting Prospect to customer to client

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Participant's Profile:-

- ❖ Newly joined advisors and exiting advisors who want improve their income
- ❖ Agency managers and Branch Managers to create agency teams of high productivity.
- ❖ Sales Officers of direct sales channels, Banca Channels, Broking Channels, IMF and other distribution channel

Course Coordinator:-

Mr Vepachedu Jayanth Kumar – 022-26544285 Email: vjayanth@iii.org.in

Program Duration & Timing: -

2 days & from 10.00 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).

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.

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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=1678

Training Venue:-

Please follow below link / QR Code for Training Venue

<https://qr.go.page.link/qs2Qb>



Parking Facility:-

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

Respond to:-

Ms. M M Satam	college_insurance@iii.org.in	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.**