



Insurance Institute of India, COI, Mumbai

Virtual Training Session on Creating High Performers in Bancassurance Channel (CVT)

4th November, 2025

PROGRAM COORDINATOR:

Mr. Krishnamohan Y, Faculty

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PROGRAM DURATION:

1 day (CVT)

PROGRAM DATE:

4th November 2025

PROGRAM TIME(IST):

10.30 AM to 01.30 PM (3 Hrs.)

PROGRAM FEES:

₹ 1770/-

(₹ 1500/- plus 18% GST)

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PROGRAM CONCEPT AND OBJECTIVES:

In the Competitive Era, a sustainable and cost effective distribution channel is the need of the hour and Bancassurance is the most sought-after "distribution channel" for garnering individual new Business premiums for all Life and Non-Life Insurers. This is because of the

- The low acquisition cost of acquiring business compared to other channels
- The captive customer base easing the challenges of cold calling and prospecting

Though Bancassurance channel is in vogue for over 20 years, Insurers still face the challenges pertaining to Specified Persons who often perceive role conflict and injustice to their core business. This requires better role clarity and Customer perspective to motivate them to effectively market Insurance solutions. Awareness of Regulatory compliance requirements, developing the selling competencies among the Specified Persons of the Bank, require continuous support, empowerment and hand holding by Bancassurance Managers of the Insurance companies.

Keeping the above in mind, this Program has been designed to provide the necessary skills, conviction and knowledge to the Bancassurance Managers of life and non-life Insurance companies.

COI has created '*Virtual Training (CVT) Rooms*' to conduct training program in a cost-effective manner for participants to equip themselves academically at their respective locations.

KEY TAKEAWAYS FROM THE PROGRAM:

The participants of the Program will get the knowledge, and appreciation of the following

- The Need for Banks to sell Insurance Products-Perspectives of Banks & Customers
- Core Distinctions, Issues and challenges of Bancassurance business.
- The leadership role of a Bancassurance Manager today.
- Enhancing Productivity of Specified Personas to achieve higher performance levels.
- Creating Win-win Situation for the Banker and the Insurer
- Ensuring Regulatory Compliance

PARTICIPANT PROFILE:

Front-line sales and marketing executives of Life and Non-Life Insurance companies responsible for Bancassurance business targets who manage the Specified Persons from the Banks.

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