Insurance Institute of India, COI, Mumbai

Classroom Training Session on Communication & Presentation Skills for Connecting with Customers (CT) - 7 to 8 December 2026

Program Concept and Objectives: Millennial and Gen-Z customers now form a large share of the insurance market. They expect transparent, mobile-first, and personalized experiences; quick responses over preferred channels (WhatsApp, Instagram, email, chat); and content that is concise, visual, and trustworthy. This program reframes communication and presentation skills to meet those expectations while staying ethical and compliant.

Objectives: At the end of the workshop, the participants are expected to

- Understand generational traits and customer personas for Millennial and Gen-Z segments.
- Adopt omnichannel communication strategies (in-person, phone, email, chat/WhatsApp, social, video) with consistent tone and message.
- Apply storytelling, empathy, and behavioral science to build trust and drive decisions.
- Design impactful, visual-first presentations and micro-content that work on mobile.
- Leverage AI responsibly for personalization, scripting, slide creation, and analytics.
- Embed privacy, consent, and ethical selling in every interaction.
- Measure effectiveness with clear KPIs (response time, CSAT/NPS, conversion, retention).

Key Takeaways from the program:

- Customer-centric message maps and ready-to-use scripts across channels.
- A repeatable presentation framework with hooks, visuals, and clear calls-to-action.
- Templates for WhatsApp/email outreach, discovery questioning, and objection handling.
- AI-assisted workflow examples and prompt library for content and data storytelling.
- Privacy-friendly practices: consent capture, data minimization, and transparent communication.
- Personal brand checklist and inclusivity & accessibility guidelines.

Participant Profile: Junior to Mid-level executives in Marketing, Sales, Customer Service & Engagement, Team Leads, and emerging leaders in insurance distribution and operations.

Program Fees:

- Participants requiring residential facilities: Total amount Required – Rs. 12980/- i.e. (Rs. 11000/- 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. 9440/- i.e. (Rs. 8000/- plus 9% CGST + 9% SGST).
  (The fees cover tuition, course material and day boarding (i.e. breakfast, lunch and tea/coffee during tea breaks for actual days of training).

Program Coordinator: Mr. Subash Pattanayak, Faculty, Email: pattanayak@iii.org.in, Contact: 022-69654204

Program Date: 7 to 8 December | **Program Duration: 2 days (CT)** | **Program Time (IST): 10.00 am to 5.00 pm**

PROGRAM VENUE:
College of Insurance, Insurance Institute of India,
Plot No. C-46, G-Block, BKC,
Mumbai - 400 051.
Please follow the link / scan QR Code for training venue

https://qrgo.page. link/qs2Qb

PROGRAM TEAM:

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