

College of Insurance
Insurance Institute of India, Mumbai
Classroom Training Session on Retail Marketing for General
Insurers - Program ID – CPG48
(From: 7th – 8th December 2023)

Relevance of the Program:-

The retail insurance has been a significant segment within the GI industry in India, and its share has been growing steadily over the years. Retail marketing thus includes products targeting individual customers, families and small businesses in the rural and urban sector, covering personal assets and risks such as motor insurance, health insurance, personal accident insurance, home insurance and travel insurance etc. These products cater to the diverse needs of retail customers and contribute to the overall growth of the industry.

Retail marketing is essential for general insurance product distribution and increasing the overall penetration of insurance in the country. It enables insurers and intermediaries to effectively reach, engage and service the individual retail customers by optimizing distribution channels, building brand awareness & trust and building long –term customer loyalty.

Retail marketing helps the insurers and the intermediaries to tap larger customer base and enhance the revenue growth through steady premium income and encasing the cross-selling and up-selling opportunities that it presents.

College of Insurance has designed the above program to provide the participants from insurance companies, brokers, agents, corporate agents etc. with a comprehensive understanding of various retail insurance marketing strategies and techniques which will help them to boost sales in the retail insurance sector and meet targets.

Program Objectives:-

- Overview of retail market, understanding target audience and its segmentation.
- Identifying and focusing on popular retail products and assessing market trends.
- Understanding various distribution channels including role of digital platforms and technology.
- Understanding retail insurance marketing strategies with customer-centric approach.
- Understanding customer retention and unique customer experience for growth.
- Exploring cross-selling and upselling opportunities and other sales techniques.

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Participant's Profile:-

Marketing Executives of all levels in insurance companies, Specified Persons in Banks, Brokers, Agents, Micro Insurance Agents, Marketing Firms and /or agencies dealing with retail market.

Course Coordinator:-

Mr. Arun Kumar Bhatia – 022-69654247 Email: arunbhatia@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.

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3) Please see below details for Bank Transfer.

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.insuranceinstituteofindia.com/o/COI_WebPortal/cmc/eventDetails?eventid=1908

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:-

Mr. Vivek Rane	college_insurance@iii.org.in	022-69654284
Ms. Nilambari Bagde		022-69654234
Ms. Snehal Vartak		022-69654251
Ms. Vrushali Nagawekar		022-69654266
Ms. Jayashree Salian		022-69654249
Ms. Sneha Pednekar		022-69654270
Ms. Mrunal Satam		022-69654216

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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.*