

**College of Insurance**  
**Insurance Institute of India, Mumbai**  
**Classroom Training Session on Policyholders Service and Protection**  
**of Policyholders Interests for Life Insurance (Ct-PS&PPILI)**  
**Program ID – CPL61, (From: 15<sup>th</sup> – 16<sup>th</sup> February 2024)**

**Relevance of the Program:-**

In today's marketing world consumer is considered to be the King. The customer is the purpose any business and there is no business without the Customer. Therefore, the activities of a business organization have to be Customer Centric. Customer Service and Customer engagement plays an important role in Customer satisfaction and Customer Retention. Every customer will have certain basic expectations regarding service quality when they are purchasing a product or a service. Therefore, it is essential that service expectations of customer, before, during and after purchase of the product have to be perceived well by the Business organizations. They have to design the activities in such a way that to enhance the level of customer satisfaction.

Customer satisfaction and customer engagement is very essential since the nature of the business is unique. Insurance contracts between the Insurer and the Policyholder are very long term and insurance contracts involve many intricacies. The insurance companies have to deal with the nominees of the Policyholders in many situations. The service given by the Insurance Company at various stages of the term of the policy till settlement of claim and way which the service rendered is important in Customer satisfaction. The IRDAI has issued regulation for protection of Policyholder' interests. This regulation is called IRDAI (Protection of Policyholders' Interests) Regulation, 2017. The objective of the regulation is to ensure that interests of insurance policyholders are protected and ensure that insurers, distribution channels and other regulated entities fulfil their obligations towards policyholders and have in place standard procedures and best practices in sale and service of insurance policies.

**Program Objectives:-**

This is a program to discuss about the significance of Customer service and Customer Engagement in Insurance Industry and also discuss the regulation relating to the protection of Policyholders interests.

**Coverage of Topics in this program:**

**Customer service**

- The ten customer service skills
- Acquiring professionalism in customer service
- The customer service management
- Achieving excellence in Customer service

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- Dealing with challenging customers
- To make your company the most recommended one by your customers
- Customer satisfaction and loyalty: Strategies and Measurement

**Policyholder protection:**

- Steps Taken by IRDAI to Safeguard the Interests of Policyholders
- What is Protection of Policyholders' Interest Regulations 2017?
- Companies commitment to Policyholder Protection

**Participant's Profile:-**

Executives working in Insurance Companies, Broker firms, Specified Persons working in Banks, Corporate agents, etc.

**Course Coordinator:-**

Mr. Krishnamohan Y– 022-69654209      Email: [ykmohan@iii.org.in](mailto:ykmohan@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).

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**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.

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/regDetails.htm?eventid=1944](https://www.insuranceinstituteofindia.com/o/COI_WebPortal/cmc/regDetails.htm?eventid=1944)

**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	<a href="mailto:college_insurance@iii.org.in">college_insurance@iii.org.in</a>	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.*