

# Virtual Training Session on Cultivating Brand Ambassadors in the Insurance Ecosystem (CVT) - 7 May, 2026



## Program Concept and Objectives:

In today's hyper-connected marketplace, the power dynamics of business have shifted. The modern insurance consumer is no longer a passive policyholder; they are a powerful influencer. In a sector where products can be easily replicated, the **Customer Experience (CX)** becomes the ultimate competitive advantage. When a customer feels valued, heard, and empowered, they transcend the role of a consumer to become a **Brand Ambassador**. These advocates voluntarily defend the brand, drive organic growth through referrals, and provide the social proof necessary to close sales in an era of skepticism. For Indian insurers, transforming satisfied clients into vocal advocates is the most cost-effective strategy to fuel long-term loyalty and business expansion.

This 3-hour virtual masterclass is designed to move beyond basic satisfaction. It provides insurance professionals with a roadmap to create "Aha!" moments throughout the policy lifecycle from onboarding to claims turning every touchpoint in to an opportunity for advocacy.

Program aims that upon completion of this session, participants will be able to:

- Master the Advocacy Mindset: Understand why customer advocacy is the highest form of marketing
- Engineer Exceptional Experiences: Manage "Moments of Truth" in insurance journey to get loyalty
- Activate Referral Engines: Develop systematic techniques to encourage organic word of mouth and structured customer referrals without compromising professional ethics.
- Quantify Social Capital: Learn to use metrics like Net Promoter Score (NPS) and Customer Effort Score (CES) to track the direct impact of advocacy on the bottom line.

## Key Takeaways from the program:

- The Psychology of Loyalty: Deep dive into what makes an insurance customer feel truly "invested" in a brand's success.
- CX Design Thinking: Practical frameworks for delivering service that exceeds expectations during the claims and servicing process.
- The Referral Toolkit: Proven methods for agents and advisors to turn positive feedback into high-quality leads.
- Measurement & ROI: Best practices for tracking "Earned Growth" and the lifetime value of an advocate.

**Participant Profile:** This session is designed for the entire value chain of customer interaction:

- Sales & Distribution: Agents, advisors, and brokers looking to build a referral-based practice.
- Operational Leadership: Branch Managers and Development Officers responsible for regional growth and retention.
- Service & Claims Excellence: HODs of Policy Servicing and Claims, and Customer Relationship Executives who manage critical touchpoints.

## Program Duration & Timing:

**Program Date:** 7 May 2026

**Duration:** 1 day (CVT)

**Program Time (IST):**

10.30 AM to 01.30 PM

## Program Coordinator:

**Mr. Subash Pattanayak, Faculty**

**Email:** [pattanayak@iii.org.in](mailto:pattanayak@iii.org.in)

**Contact No:** 022-69654283

## Program Fees:

**Rs. 1770/-**

(₹ 1500/- plus 18% GST)

## Certificate of Participation:

Online Certificate in PDF format will be issued to all the participants.

**REGISTER NOW!**

**Program ID : CPL**

## PROGRAM TEAM:

|                        |  |              |
|------------------------|--|--------------|
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