

College of Insurance
Insurance Institute of India, Mumbai
Classroom Training Session on Understanding Life
Insurance Operations for Middle Level Managers
(CT-ULIO)
(From: 10th to 11th June, 2024)

Program Concept and Objectives:

In the post pandemic era Life Insurance industry is passing through a series of changes due to increase awareness among the insurable population and continuous amendments directed by the Regulator. Insurers are trying hard to match with the expectations with the Regulator's mission of "Insurance For All by 2047".

So, it requires a comprehensive understanding of the Life Insurance business and operations. As a middle level manager the role and responsibility involves efficiently handling of customer grievances and guiding the new team members to act upon diligently in a completely changed competitive Insurance ecosystem. It is crucial for the middle manager to be well-versed with the complexities of various aspects of the life insurance business to inculcate confidence among the team members.

Keeping the aforesaid in mind, this program is designed to cover the areas necessary for grasping for middle level managers under multiple disciplines so that participants will be able to discharge their functional responsibilities more effectively.

Participation in this course would provide a unique opportunity to learn from esteemed faculties with rich industry experience along with interaction with exchange of ideas with professionals coming from different insurance organizations, which can benefit one another with the best practices adopted across the industry.

Understanding complexities of Life Insurance operations so that middle level managers are better equipped to supervise and guide their subordinates and add value to what they are contributing to take their company to the next level of growth and proficiency in today's competitive era.

Key Takeaways from the Program:

- ✚ Emerging Marketing trends in Insurance.
- ✚ Basics of Risk Management.
- ✚ Principles of Insurance.
- ✚ Embedded value, VNB, VNB Margin, APE, Persis
- ✚ Digital Marketing.
- ✚ Life Insurance Distribution channel management.
- ✚ Insure tech and its impact on the industry
- ✚ CRM & Grievance Redressal Mechanism
- ✚ Business Ethics and Corporate Governance.
- ✚ Internal audit and overview of fraud detection.



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Participant Profile:

The Program is mainly designed for insurance executives of the middle management level from various life insurance companies as well as those working in broking firms to enable them understand complexity of life insurance operations. It may also be useful for insurance professionals seeking to update their knowledge and skills in various aspects of life insurance business.

Program Coordinator:

Mr.Subash Pattanayak

022-69654204

Email: pattanayak@iii.org.in

Program Duration & Timing:

2 days & from 10.00 a.m. to 05.00 p.m.

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Program 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.
- 3) Please see below details for Bank Transfer.

Name of the Beneficiary	Insurance Institute of India
Account No.	004010100143462
IFS Code	UTIB00000004
MICR Code	400211002
Swift Code	AXISINBB004
Name of Bank	Axis Bank Ltd
Address	Branch - Fort Branch Address - 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=2076>



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Program Venue, Location and Parking:

Program Venue:

College of Insurance,
Insurance Institute of India,
C-46, G-Block, Bandra-
Kurla Complex,
Mumbai - 400 051 India.

Please follow the link /
scan QR Code for
training venue.



<https://qr.go.page.link/qs2Qb>

Public parking is available at 5 minutes walking distance (Behind US Consulate).

Program Team:

Ms. Nilambari Bagde	college_insurance@iii.org.in	022-69654234
Ms. Snehal Vartak		022-69654251
Ms. Vrushali Nagawekar		022-69654266
Ms. Jayashree Salian		022-69654249
Ms. Mrunal Satam		022-69654216