

**College of Insurance**  
**Insurance Institute of India, Mumbai**  
**Classroom Training Session on Marketing Strategies for Branch**  
**Managers and Heads of Marketing Units: Life Insurance**  
**Program ID - CPL14**  
**(From: 7<sup>th</sup> to 8<sup>th</sup> June 2023)**

**Relevance of the Program:-**

In the complex and challenging business environment of today, branch managers and leaders of marketing units face a very tough job. As the de facto CEO at the local level, he /she has multiple roles – developing marketing strategies to spread the business and build the brand; delivering customer value through service and relationships; creating a high quality team and developing both people and processes to deliver value and ensuring growth and profits.

Marketing is ultimately about acquiring and keeping customers through building “wow” experiences. This falls for creating, communicating and delivering exciting customer value propositions.

**Program Objectives:-**

The Role and Job of a BM/BH in Life Insurance Company calls for

Achieve targeted business results in the Retail business through effective translation of the business strategy into Branch Plans. Provide leadership and motivation to the Branch team towards raising of performance standards, and be a valuable resource to the Company.

1. Distribution Deliverables
2. Business results
3. Resource Management
  - a. Operational Cost Management
  - b. People Development
4. Customer Relations Management
5. Adherence to regulatory and compliance norms.

**Participant's Profile:-**

Branch Managers / Marketing Unit heads with ideally a year or two of experience in the position.

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Topics covered in this program and Key Take away.

S.No	TOPIC	KEY TAKEAWAY
1	Role of a Branch Manager/ leader in the contemporary context	The Role of a BH-the Job Description
2	Elements in designing a Strategic Marketing Programme	Why is it necessary to prepare a Marketing Plan?
		What elements to be there in the plan to be successfully executable
		Activities towards realizing the planned objectives
3	Building selling competence – what it means and calls for	Where I am now and what do I know (or not know)
		The general team vs Your Ideal Sales team
		Top performers' team qualities
		Recruitment process-Good practices for advisor recruitment
		Common Hiring pitfalls for advisors and representatives
		Selecting the sourcing pools for recruitment
		Interview/interaction -Career Opportunity presentation for advisors
		Understanding why advisors quit
5 to 8 steps of retention of agents		
4	Team Management	What is distribution management
		Training your team- the sales process and fundamental principles of selling
		General relationship-vs-Business relationship
		creating trust- Key factor for business
		Improving your soft skills-the communication
		interacting skill with group of strangers
		The art of relationship management
		Some mistakes sales teams make-Stich in time
		Effective sales techniques for your team
The demotivates-be careful		

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		Why Sales Managers fail- How you manage your Development/Sales Managers
		Budget vs Achievement-team targets
5	From Manager to Leadership Transition. The qualities of a leader	Learning how to be effective vs. being busy
		Diagnosing and solving issues through your team members
		Innovation over Perfection
		Root cause analysis for causes vs. symptoms
		Mentoring the few to Maximize the many
		Simplifying and Prioritising the Tasks
		Critical thinking and analysis
		Anchoring yourself for greater Achievement

**Course Coordinator:-**

Mr Krishnamohan Y– 022-26544209      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.

<b>Name of the Beneficiary</b>	<b>Insurance Institute of India</b>
<b>Account No.</b>	<b>004010100143462</b>
<b>IFS Code</b>	<b>UTIB0000004</b>
<b>MICR Code</b>	<b>400211002</b>
<b>Swift Code</b>	<b>AXISINBB004</b>
<b>Name of Bank</b>	<b>Axis Bank Ltd</b>
<b>Address</b>	<b>Fort Branch, Universal Insurance Building, Ground Floor, Sir P M Road, Fort, Mumbai – 400001.</b>

- 4) For online payment mode by following the below link

[https://www.insuranceinstituteofindia.com/o/COI\\_WebPortal/cmc/regDetails.htm?eventid=1702](https://www.insuranceinstituteofindia.com/o/COI_WebPortal/cmc/regDetails.htm?eventid=1702)

**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:-**

Ms. M. M. Satam	<a href="mailto:college_insurance@iii.org.in">college_insurance@iii.org.in</a>	022-26544216
Ms. J. P. Salian		022-26544324
Ms. V. V. Nagwekar		022-26544266
Ms. S. H. Vartak		022-26544251
Ms. N. B. Bagde		022-26544234
Mr. P. D. Palav		022-26544254
Mr. V. M. Rane		022-26544297

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**Nomination Form**

1) Name: \_\_\_\_\_

2) Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Please affix  
your  
photograph  
here

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: \_\_\_\_\_

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.**