

Insurance Institute of India, COI, Mumbai

Virtual Training Session on Creating High Performers in Bancassurance Channel (CVT) - 24 June, 2026

Program Concept and Objectives:

Bancassurance today stands at the critical juncture of having to perform at the peak of potential to support the goal of Insurance for all by 2047 while acting completely in consonance with the regulatory requirements. This requires high level of professional competence in terms of knowledge, skills and application on the part of banca executives and specified persons.



This One day intensive workshop is designed to transform bancassurance managers and specified persons into high performers by focusing on practical skills, compliance, and measurable outcomes. The program emphasizes activation strategies, customer-centric engagement, and branch-level productivity through structured modules and hands-on activities.

At the end of the program, the participants will be able to:

- Understand the economics of bancassurance and its impact on bank profitability.
- Develop role clarity and time management strategies for Specified Persons (SPs).
- Master discovery techniques and micro-pitching for customer engagement.
- Handle objections and ensure compliance in documentation.
- Implement pipeline management and coaching routines for sustained performance.

Key Takeaways from the program:

- Increase Active SP Rate by 25–35% within 60 days.
- Improve lead-to-meeting and meeting-to-quote conversions.
- Enhance branch-level fee income and compliance accuracy.
- Establish sustainable coaching and recognition routines.

Participant Profile:

- Bancassurance Executives of life, general, health insurers
- Specified persons of banks
- Relationship Managers

Program Date: 24 June 2026 **Program Duration:** 1 day (CVT) **Program Time (IST):** 10.30 am to 01.30 pm

Program Coordinator: Mr. Deepak Sangal, Faculty, Email: dsangal@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.

PROGRAM TEAM:

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