

College of Insurance
Insurance Institute of India, Mumbai
Classroom Training Session on Customer Service and Claims Management
Program ID – CPL19
(From: 19th to 20th June 2023)

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 organisations 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 organisations. 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.

Claim is an integral and important aspect of any Insurance Company's operations. Claims may be Death claims or Maturity Claims. Policyholders expect that the claims should be settled on time so that the purpose for which the Policy is taken is served. Insurer's credibility depends upon its claim settlement process the speed at which the claim is settled. Insurer also should ensure that claims should be paid to genuine claimant and genuine contingency. Fraud prevention is also another aspect. Therefore, the Claim Management is very important for any Insurer.

Program Objectives:-

This is a program to discuss about the significance of Customer service and Customer Engagement in Insurance Industry and also discuss the claim management.

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Program Contents:-

- Importance of Policy Service in Insurance Industry
- Various elements of Policyholders Service Life and General
- Board Policy of Customer Service Policyholders Interest Protection
- Death Claims settlement process
- Settlement of Early Death Claims
- Legal Issues relating to claims
- Impact of early claims on Surplus of an Insurer
- Brand Creation – Role of settlement of Claims

Participant's Profile:-

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

Course Coordinator:-

Mr. Jayant Kumar, (Email id: vjayanth@iii.org.in Contact no. 022 - 26544285)

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=1711

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	college_insurance@iii.org.in	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:

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.**