



Virtual Training Session on Policyholders Service and PPHI Regulations (CVT) - 5 October, 2026

Participant Profile:

Junior to Middle level Executives working in CRM, Customer facing, frontline positions in Life Insurance Companies, Broker firms, Corporate Agents.

Program Date:

5 October 2026

Program Duration:

1 day (CVT)

Program Time (IST):

10.30 am to 01.30 pm

Program Coordinator:

Mr. P C Paikray, Faculty,

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Program Concept and Objectives:

Customer satisfaction and customer engagement are very essential since the nature of insurance business is unique. The insurance contracts and therefore the relationship between the Insurer and the Policyholder are often long term and insurance contracts involve many intricacies. The insurance companies have to deal sensitively with the nominees of the Policyholders in many situations. The service experience given by the Insurance Company at various stages of the Customer Journey from Sales to the Claim settlement is an important determinant in Customer satisfaction and Retention.

IRDAI (Protection of Policyholders' Interests) Regulation, 2024 and the Master Circular have been notified with the objective of ensuring that interests of insurance policyholders are protected at all times and to ensure that insurers, distribution channels and other regulated entities fulfil their obligations towards policyholders and put in place standard procedures and best practices in sales and service of insurance policies. Policyholder Grievance Resolution has now attracted the attention of top policymakers and Insurers are putting their house in order with competence development among employees and bringing a cultural shift. With this background and the underlined need for wide spread training on this critical aspect, CoI has designed a cost effective virtual training program.

Key Takeaways from the program: The participants of the Program will gain the knowledge and insights into

Customer service

- Do we know our Customers?
- Understanding Millennial and Gen Z Customers
- Making Customer touchpoints delightful – Adding value
- Dealing with difficult Customers
- Moments of Truth-Trust Equation- Sensitivity at Claim stage
- Grievance handling
- Best Practices in Customer Experience

Policyholder protection:

- Steps Taken by IRDAI to Safeguard the Interests of Policyholders
- All the important provisions of IRDAI Protection of Policyholders' Interest Regulations 2024 including Master Circular

Program Fees: Rs. 1770/- (₹ 1500/- plus 18% GST)

Certificate of Participation: Online Certificate in PDF format will be issued to all the participant

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PROGRAM TEAM:

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