



# College of Insurance Insurance Institute of India, Mumbai Virtual Training Session on Boosting Productivity of Marketing Personnel of Banks, Corporate Agents, Brokers (CVT-BPMP), (On: 16<sup>th</sup> October, 2024)

## Program Concept and Objectives:

It is widely agreed that compared to the vast potential of the bancassurance and Corporate Agency/Broker channels, the actual performance in terms of business leaves much to be desired. Activation of branches continues to be a big challenge. Under the circumstances the role of specified persons in banks and other Corporate Agents, Brokers through whom business is to be solicited comes under focus. There is a need to improve the understanding of these specified/authorized persons about basic concepts of Insurance and that of salesmanship, Product categories and conviction in the concept of Insurance. It is also equally important to clarify and resolve satisfactorily the conflict about core business priorities and that of third parties by placing the bank Customer Needs in the focus. Complying with regulatory requirements is also an imperative.

Keeping the knowledge needs of specified persons of banks, corporate agents, brokers in the mind, this one day *'Virtual Training Session'* is designed. Experienced Faculty both from the College of Insurance and Industry will deal with the sessions in interactive method.

## Key Takeaways from the Program:

The training program provides the participants the understanding of the following

- Basic principles of Insurance (Life, General & Health)
- Insurance Product Categories, USPs, Life stages (Life, General & Health)
- Fundamentals of Insurance selling
- Regulatory requirements in Insurance selling
- Customer need assessment and Product Recommendations
- Record maintenance and post-sale service
- Importance of bancassurance/ C.A/ Broker in fulfilling Customer financial needs and fee based income

## Participant Profile:

Specified/Authorized persons of banks, corporate agents and brokers involved in Insurance marketing and Principal Officers / Corporate Insurance Executives in banks, corporate agents, brokers.



**College of Insurance**  
**Insurance Institute of India, Mumbai**  
**Virtual Training Session on Boosting Productivity of**  
**Marketing Personnel of Banks, Corporate Agents, Brokers**  
**(CVT-BPMP), (On: 16<sup>th</sup> October, 2024)**

**Program Coordinator:**

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**Program Duration & Timing:**

1 day & from 10.00 a.m. to 05.00 p.m.

**Program Fees:**

The Program Fees: Rs.3540/- (Rs. 3000/- + 9% CGST + 9% SGST)

**How to Enroll:**

Please click the below link to register the program

[https://www.insuranceinstituteofindia.com/o/COI\\_WebPortal/cmc/eventDetails?eventid=2226](https://www.insuranceinstituteofindia.com/o/COI_WebPortal/cmc/eventDetails?eventid=2226)

**Certificate of Participation:**

Online Certificate in PDF format will be issued to all the participants.

**Program Team:**

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