

Virtual Training Session on Policyholders Service and PPHI Regulations (CVT) 6th October, 2025

PROGRAM CONCEPT AND OBJECTIVES:

Customer satisfaction and customer engagement are very essential since the nature of the life insurance business is unique. The life insurance contracts and therefore the relationship 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 experience given by the Insurance Company at various stages of the Customer Journey from Sales to the Claim settlement important determinant in Customer satisfaction and Value proposition.

IRDAI (Protection of Policyholders' Interests) Regulation, 2024 has 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 life insurance policies.

COI has created '**Virtual Training (CVT) Rooms**' to conduct training program in a cost-effective manner for participants to equip themselves academically at their respective locations.

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

PARTICIPANT PROFILE:

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

PROGRAM DURATION: 1 day (CVT)

PROGRAM DATE: 6th October 2025

PROGRAM TIME(IST):

10.30 AM to 01.30 PM (3 Hrs.)

PROGRAM COORDINATOR:

Mr. V Jayanth Kumar, Faculty

Email: vjayanth@iii.org.in, Contact No: 022-69654285

PROGRAM FEES: ₹ 1770/- (₹ 1500/- plus 18% GST)

CERTIFICATE OF PARTICIPATION: Online Certificate in PDF format will be issued to all the participants.

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