

Classroom Training Session on Strategic Selling in Life Insurance Industry (CT) 3rd November 2026

Participant Profile:

The program is designed for serious minded insurance practitioners who are working and/ or interested in the field of Insurance agency.

- Senior Agency Advisors and MDRT/CM Club Agents
- Corporate & Business Insurance Specialists
- Wealth Managers and Financial Planning-Oriented Agents
- Relationship Managers Handling Professionals & High-Income Clients
- Agency Leaders (ADMs, BDMs) with Team-Building & Large-Case Experience

Program Date: 3 November 2026

Program Duration: 1 day (CT)

Program Time (IST):

10.00 am to 05.00 pm

Program Coordinator:

Mr. P. C. Paikray, Faculty,
Email: pattanayak@iii.org.in,
Contact: 022-69654203

Program Fees:

- **Non-residential participants: Total amount Required – Rs. 4720/- i.e. (Rs. 4000/- plus 9% CGST + 9% SGST).**

(The fees cover tuition, course material and day boarding (i.e. breakfast, lunch and tea/coffee during tea breaks for actual days of training).

Program venue:

College of Insurance, Insurance Institute of India,
Plot No. C-46, G-Block, Bandra-Kurla Complex, Mumbai - 400 051.
Please follow the link / scan QR Code for training venue



<https://qrco.page.link/qs2Qb>

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PROGRAM CONCEPT AND OBJECTIVES:

Affluent businesses and family-run enterprises today operate in an increasingly volatile environment where financial unpredictability, regulatory shifts, and succession-related complexities can pose significant risks. These organizations recognize that safeguarding their most critical assets—people, leadership continuity, and accumulated wealth—is essential for long-term sustainability. As a result, they actively seek structured, tax-efficient solutions that help them manage human-capital dependency, ensure smooth transition of control, and protect business value in the face of unforeseen events such as the loss of a key person, partner exit, or generational change.

Against this backdrop, strategic selling in insurance agency plays a crucial role. Unlike traditional product-led sales, strategic selling emphasizes consultative engagement, deep understanding of business structures, financial exposure, and legacy goals. Agency advisors equipped with advanced business-insurance knowledge can identify specific risks across ownership, partnership, and employee frameworks. This enables them to position specialized solutions—such as Keyman Insurance for profit protection, Partnership buy-sell insurance for ownership continuity, Employer-Employee plans for retention and loyalty, and HUF-based policies for structured family wealth transfer—in a manner that aligns with the enterprise's strategic priorities.

Program Objectives: Providing insights into

- Integration of advanced insurance solutions into advisory approach
- Taking on the role of trusted business partners. Graduating to higher coverage amounts, multi-year commitments, and estate-planning relevance
- Stronger client relationships, and improved persistency and continuity of the businesses.
- Focus on understanding the intersection of risk protection and tax optimization
- Elevate the advisor's credibility and enhance the long-term financial security

KEY TAKEAWAYS FROM THE PROGRAM:

- Diagnose business and family-enterprise protection gaps and quantify coverage using valuation/human-capital methods.
- Structure ownership, beneficiary, and agreements correctly for Keyman, Partnership, Employer-Employee, and HUF cases.
- Explain high-level tax implications, documentation, and compliance considerations confidently (with disclaimer).
- Position value beyond price—emphasizing continuity, control, retention, and legacy.
- Create larger, advisory-led cases with stronger persistency and referrals.

PROGRAM TEAM:

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