

Enhancing the Productivity of Specified-Authorized Persons of Banks, other Corporate Agents and Brokers for CAs (CVT) -13th October, 2025

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, 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.

Keeping the knowledge needs of specified persons of banks, corporate agents, Authorized Persons of brokers in the mind, this one day '**Virtual Training Session**' is designed.

Program Contents:

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

KEY TAKEAWAYS FROM THE PROGRAM:

- Appreciate and understand the basic insurance concepts
- Understand the basic insurance product categories
- Exposed to fundamentals of life insurance selling
- Customer need assessment and Suitable Product recommendation
- Importance of bancassurance/ Corporate agency/ brokers in Customer financial need fulfilment & importance of non-interest income

Program Methodology: Front line sales and marketing executives of Life Insurance companies responsible for Bancassurance targets who manage the Specified Persons from the Banks.

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.

PROGRAM DURATION: 1 day (CVT)

PROGRAM DATE: 13th October 2025

PROGRAM TIME(IST): 10.30 AM to 01.30 PM (3 Hrs.)

PROGRAM COORDINATOR:

Mr. Krishnamohan Y, Faculty

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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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