Insurance Institute of India, COI, Mumbai

Webinar on
AI-Powered Sales in Insurance

Background:

Insurance sales is changing quickly. Customers now research, compare and buy with the help of digital tools and AI assistants, and they expect personalised, timely and consistent advice. Artificial Intelligence (AI) and Generative AI (GenAI) give sales teams, agents and distributors practical ways to meet these expectations. They help teams work faster, reach the right prospects and have better conversations with customers. This webinar is a practical, industry-focused session that shows insurance professionals how to use AI to improve sales effectiveness, customer engagement and business growth.

Importance of AI and Generative AI in the Sales Function:

- AI uses data to predict, score and recommend. GenAI uses large language models to create text, summaries and conversational responses. Together they support the whole sales lifecycle:
- Smarter prospecting and lead prioritisation: AI can flag high-potential leads, renewals and customers at risk of lapsing, so that sales effort goes where it is most likely to pay off.
- Hyper-personalised engagement: GenAI can draft tailored outreach, product explanations and client briefs in seconds, which makes conversations more relevant to each customer.
- Higher agent productivity: AI assistants take over routine tasks such as follow-ups, data collection and documentation, which gives agents more time for complex advice and relationship building.
- Cross-sell and up-sell insights: AI can compare similar customer profiles and highlight coverage gaps and next-best actions.
- Always-on customer support: Virtual assistants can answer product questions and help customers compare options at any time of day.
- Coaching and consistency: GenAI can offer talking points, objection handling and real-time guidance, which helps maintain a consistent quality of sales conversations.
- Industry research suggests that insurers are shifting AI investment towards front-office use cases such as personalised marketing, chatbots and cross-selling, and that generative AI will improve agent productivity, customer self-service and personalisation at scale in distribution. AI-driven customer journeys are also expected to grow, so distributors must equip their teams to work alongside AI tools. Adoption must stay responsible. Output accuracy, data privacy, regulatory compliance and human oversight remain important considerations.

Key Takeaways from the program: The program is designed to provide the following:

- A clear understanding of AI and GenAI concepts in the context of insurance sales.
- Practical use cases for lead management, customer engagement, content creation and sales support.
- Guidance on responsible use, including accuracy, privacy and human oversight.
- Ideas for starting or scaling AI adoption within their own teams.

Objectives of the Webinar

- Build awareness and practical skills to use AI across the insurance sales lifecycle
- Help participants improve productivity, customer experience and sales outcomes.
- Explore real-world use cases and proven applications of AI and GenAI for sales and distribution.
- Encourage responsible and effective adoption of AI in the insurance business.

Audience: Insurance Sales Professionals

Program Fees: Rs. 590/-(₹ 500/- plus 18% GST)

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Program Date: 19 December 2026 | **Program Duration: 3hr-Virtual** | **Program Time (IST): 10.00 am to 01.00 pm**

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