



College of Insurance
Insurance Institute of India, Mumbai
Virtual Training Session on Creating High performers in
BancaChannel (CVT-CHPB)
(On: 6th January, 2025)

Program Concept and Objectives:

In the Competitive Era, a sustainable and cost effective distribution channel is the need of the hour and Bancassurance is the most sought-after "distribution channel" for garnering individual new Business premiums for all Life Insurers. This is because of the

- The low acquisition cost of acquiring business compared to other channels
- The captive customer base easing the challenges of cold calling and prospecting

Though Bancassurance channel is in vogue for over 20 years, Insurers still face the challenges pertaining to Specified Persons who often perceive role conflict and injustice to their core business. This requires better role clarity and Customer perspective to motivate them to effectively market Insurance solutions. Awareness of Regulatory compliance requirements, developing the selling competencies among the Specified Persons of the Bank, require continuous support, empowerment and hand holding by Bancassurance Managers of the Insurance companies.

Keeping the above in mind, this Program has been designed to provide the necessary skills, conviction and knowledge to the Bancassurance Managers of life Insurance companies.

COI has created '*Virtual Training (CVT) Rooms*' as a cost- effective mechanism for participants to equip participants academically at their respective locations.

Key Takeaways from the Program:

The participants of the Program will get the knowledge, and appreciation of the following

- The Need for Banks to sell Life Insurance Products-Perspectives of Banks & Customers
- Core Distinctions, Issues and challenges of Bancassurance business.
- The leadership role of a Bancassurance Manager today.
- Enhancing Productivity of Specified Personas to achieve higher performance levels.
- Creating Win-win Situation for the Banker and the Insurer
- Ensuring Regulatory Compliance

Participant Profile:

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



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Program Coordinator:

Mr. Krishnamohan Y

022-69654209

Email: ykmohan@iii.org.in

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=2280

Certificate of Participation:

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

Program Team:

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| Ms. Nilambari Bagde | college_insurance@iii.org.in | 022-69654234 |
| Ms. Yogeeta Kulkarni | | 022-69654255 |
| Mr. Sujay Mahadik | | 022-69654251 |
| Ms. Akshara Nagpal | | 022-69654266 |
| Ms. Jayashree Salian | | 022-69654249 |
| Ms. Mrunal Satam | | 022-69654216 |