

**College of Insurance**  
**Insurance Institute of India, Mumbai**  
**Classroom Training Session on Up-skilling teams on CRM**  
**Program ID – CPL63 (From: 20<sup>th</sup> – 21<sup>st</sup> February 2024)**

**Relevance of the Program:-**

Customers are core to any business. If customer service department/teams of your company develop strong interpersonal skills, they can maintain good communication with your customers and build lasting relationships.

Researches show that Customers go out of their way looking for companies who provide great customer service. Some find it and some not.

The US based research companies say that Customers spends 17% more to do business with companies that deliver excellent customer service. Increasing customer retention by a 5% raises the profits in between 25% to 95%.

Happy customers will become advocates for your business. They promote and recommend your business. But, they are also more forgiving when things don't go to plan.

Acquiring new customers can be challenging—and often expensive—so once someone makes a purchase, it makes sense that you'd work as hard as possible to retain them with you as long as possible-more often than not till the end of the product life cycle.

**Program Objectives:-**

- To know who is your customer
- To understand customer what is customer engagement
- To learn customer communication etiquette
- To understand customer journey and its significance for retention
- To learn achieving gold standards in customer service-Building a culture of Service Excellence.
- From Service Excellence to Customer Experience(CX)

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**Program Coverage:-**

Sr. No	TOPICS	TAKEAWAY
1	Introduction	What for we are and what we do-Setting the tone
		who are our customers
		what does customer service mean
		Service providers-Customers-Perceptions
		CASE STUDY
2	Setting the service attitudes	First Impression-make it everlasting
		Be positive-stay energetic
		Smile-the best cosmetic
		CASE STUDY
3	Addressing the customer needs	Empathising
		Jump out of the box
		Compliant-the need- addressing the need
		Going Extra mile-pushing for excellence
		CASE STUDY
4	Repeat business from existing customer	Follow up
		Dealing with tough customer-Make a turn around
		Gaining trust
		CASE STUDY
5	Customer interaction over tele-calling	The positives and limitations of tele talk
		The Telephone Etiquette
		Objection Handling over Tele-phone-the 3F method
		CASE STUDY
6	Interacting Face to Face	The positives of the meeting
		The communication-Verbal and Non Verbal
		Active listening-the techniques and methods
		Prioritising the requests, personal, email
		Adhering to the TAT
		CASE STUDY

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7	Getting back the lost customer	Understanding the problem
		rebuilding the rapport
		Rebuilding the trust
		CASE STUDY
8	Creating WOW feeling for customer-Building a culture of Service Excellence	Tips
		the customer Journey-the touch points-the pain points
		Identifying and plugging the gaps
		Product vs the Mind Set of customer- where do you gain the competitive edge
		Brand Building and Customer Experience-Creating a culture of Service Excellence
		CASE STUDY
9	Closing	group presentations
		Q&A, Feedback and close

**Participant's Profile:-**

Operations, Customer Service, CRM executives, team leaders and Managers from Insurance companies.

**Course Coordinator:-**

Mr Krishnamohan Y– 022-69654209      Email: [ykmohan@iii.org.in](mailto:ykmohan@iii.org.in)

**Program Duration & Timing: -**

2 days & from 10.00 a.m. to 05.00 p.m.

**Course Fees:-**

➤ **Participants requiring residential facilities: Total amount Required – Rs. 11800- i.e. (Rs. 10000/- plus 9% CGST + 9% SGST).**

The fees cover tuition, course material, A/C single room accommodation in the Institute's campus and full boarding (bed tea/coffee, breakfast, lunch, light refreshments in the evening and dinner). All rooms are fully furnished with attached bathroom and Internet facility.

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Rooms are reserved from 12.00 noon onwards the day prior to the commencement of the program. The participants can stay till 12.00 noon next day after the conclusion of the program.

- **Non-residential participants: Total amount Required – Rs. 8496/- i.e. (Rs. 7200/- plus 9% CGST + 9% SGST).**

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

**Payment Terms and Conditions:-**

- 1) The payment should be received by the College of Insurance before the commencement of the program.
- 2) The confirmation of registration for the program will be subject to receipt of payment.
- 3) Please see below details for Bank Transfer.

Name of the Beneficiary	Insurance Institute of India
Account No.	004010100143462
IFS Code	UTIB0000004
MICR Code	400211002
Swift Code	AXISINBB004
Name of Bank	Axis Bank Ltd
Address	Fort Branch, Universal Insurance Building, Ground Floor, Sir P M Road, Fort, Mumbai – 400001.

- 4) For online payment mode by following the below link

[https://www.insuranceinstituteofindia.com/o/COI\\_WebPortal/cmc/eventDetails?eventid=1946](https://www.insuranceinstituteofindia.com/o/COI_WebPortal/cmc/eventDetails?eventid=1946)

**Training Venue:-**

Please follow below link / QR Code for Training Venue

<https://qr.go.page.link/qs2Qb>



**Parking Facility:-**

Public parking available at 5 minutes walking distance (Behind US Consulate).

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**Respond to:-**

Mr. Vivek Rane	<a href="mailto:college_insurance@iii.org.in">college_insurance@iii.org.in</a>	022-69654284
Ms. Nilambari Bagde		022-69654234
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Ms Vrushali Nagawekar		022-69654266
Ms Jayashree Salian		022-69654249
Ms. Sneha Pednekar		022-69654270
Ms. Mrunal Satam		022-69654216

**Nomination Form**

- 1) Name: \_\_\_\_\_
- 2) Address: \_\_\_\_\_
- 3) Educational Qualification: \_\_\_\_\_
- 4) Date of Birth: \_\_\_\_\_
- 5) Position Held.: \_\_\_\_\_
- 6) Mobile No : \_\_\_\_\_
- 7) Telephone No. : \_\_\_\_\_
- 8) E-Mail: \_\_\_\_\_
- 9) Alternate E-Mail: \_\_\_\_\_
- 10) Sponsoring Organisation: \_\_\_\_\_

Please affix  
your  
photograph  
here

- 11) Food preference:  Vegetarian  Non-Vegetarian
- 12) Accommodation Required:  Yes  No

13) Details of Fee Paid: Cheque / D.D. No. \_\_\_\_\_ dt. \_\_\_\_\_  
 Drawn on \_\_\_\_\_ Bank, for Rs. \_\_\_\_\_

\_\_\_\_\_  
 Signature & seal of the authority  
 of the Sponsoring organisation

\_\_\_\_\_  
 Signature of the Participant

\*Name of Co-ordinator: \_\_\_\_\_  
 Mobile No: \_\_\_\_\_ Tel. No.: \_\_\_\_\_  
 Email-Id.: \_\_\_\_\_ Company Name: \_\_\_\_\_

\*This column is mandatory for those participants who are sponsored by company.