



College of Insurance Insurance Institute of India, Kolkata Virtual Training Session on Improving the productivity of Corporate Agents (CVT-IPCA) (ON: 10th January, 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, brokers in the mind, this one day Virtual Training Session is designed by the College of Insurance, Kolkata. The program helps the participants to appreciate and understand the basic insurance concepts, product categories, fundamentals of life insurance selling and thus help realize how Banks/Corporate Agents/Brokers can become a financial supermarkets for Customers, fulfilling their needs.

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 gain the knowledge and insight into the following

- 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 banks/other Corporate Agents/Brokers in fulfilling Customer financial needs and also secure fee based income
- Record maintenance and post-sale service



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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 Coordinator:

Mr Judhajit Sen, Faculty

Email: j.sen@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=2121

Program Team:

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