

Sales Management – Banks and Insurance

Course Overview:

This course is aimed at training candidates for the job of a “Tele caller”, in the “BFSI” Sector/Industry

Pre-requisite:

- Basic knowledge of statistics, computers

Course Objective:

Upon successful completion of the course, participants should learn:

- Identify and quantify client needs and determine appropriate product/services
- Respond to any queries/ requirements.
- Assess client investment and suggest changes if applicable.
- Provide service while ensuring that the business relationship is sustained without a lapse until the policy (In Insurance) results into a claim upon death or when a policy matures

Course Outline:

The contents of this course are designed to support the course objectives. The following is an indicative list of content which is included in this course:

- To Source Clients
- Process Applications
- Sales
- Process Claims
- Basics of Selling
- Accounting and Settlement