




# Insurance Excellence and Strategy Development Programme


Programme Duration: 5 Days




## Contact Information

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## Programme Overview

This comprehensive programme, delivered by experts from BIMTECH, provides an in-depth understanding of the insurance industry, covering key aspects such as product structures, sales strategies, risk assessment, underwriting, and claims operations. Participants will gain hands-on knowledge of emerging technologies, digital insurance sales, and life insurance regulation. Focused sessions on diversity, equity, inclusion, and achieving industry excellence (MDRT, COT, TOT) enhance practical learning, ensuring well-rounded industry insights.

## Programme Objectives

- Equip participants with a comprehensive understanding of the insurance industry, including product structures, risk assessment, underwriting, and claims operations.
- Enhance skills in negotiation, insurance sales, and social media marketing in the context of the insurance sector.
- Provide insights into emerging technologies in insurance and their impact on the industry.
- Develop an understanding of life insurance regulations and compliance practices.
- Prepare participants to achieve industry excellence benchmarks like MDRT, COT, and TOT.
- Foster awareness of diversity, equity, and inclusion in the workplace and the insurance sector.
- Strengthen participants' ability to navigate digital insurance sales and marketing strategies.
- Offer practical insights into actuarial aspects of life insurance.

## Deliverables

- In-depth knowledge of insurance product structures, risk assessment, underwriting, and claims operations.
- Enhanced negotiation and insurance sales skills, including strategies for using social media marketing.
- Understanding of emerging technologies in the insurance industry and their applications.
- Familiarity with life insurance regulations, compliance practices, and industry standards.
- Ability to achieve industry benchmarks such as MDRT, COT, and TOT.
- Practical knowledge of diversity, equity, and inclusion in the insurance sector.
- Skills to navigate and excel in digital insurance sales and marketing.
- Insights into actuarial aspects of life insurance and their impact on operations.

## Pedagogy

The programme adopts an interactive, blended learning approach, incorporating lectures, case studies, group discussions, and real-world applications. Sessions are designed to encourage participant engagement and practical learning, with a focus on industry-relevant challenges.

## Target Audience

The Programme has been designed for Life Insurance Professionals.

## Programme Details

**Mode:** In Person

**Programme Dates:** 23rd -27th March, 2025

**Venue:** Vikramshila Leadership Centre, BIMTECH Knowledge Park 2, NCR, Plot No-5, Greater Noida, Uttar Pradesh, 201306






## Programme Directors

### Dr. Meena Bhatia

#### Professor (Accounting and Finance), Dean (Executive Education)




Dr Meena Bhatia is a Finance and Accounting Professor and Dean of Executive Education at BIMTECH. She has over 26 years of work experience, fulfilling diverse roles such as teacher, trainer, researcher, corporate executive, and academic leader. Her teaching interests include financial accounting, management accounting, corporate finance, Management control systems, Securities Analysis, and portfolio management. She has also taught at the University of Bradford, UK, Kozminski University, Poland, and has been a visiting scholar at the University of Agder, Norway.

She has been an active researcher, and her research interests and contributions include topics covering financial markets, disclosures, financial reporting, carbon neutrality, and green finance. She has presented her research work at internationally acclaimed institutions such as Harvard University (Boston USA), University of London, IIM (Ahmadabad), IIT (Delhi), IIT(Kharagpur), and IIM (Lucknow), among others. Dr Bhatia has publications in national and international journals of repute; she provides research guidance to PhD scholars. Dr Bhatia is passionate about management development and training programs.

She routinely conducts training & development programmes in costing, finance, accounting, analysis, and investments for managers of Indian and Public sector enterprises. She has provided consultancy to small and medium-scale enterprises. She has a PhD, as well as FCMA, CFA, MBA, and B.Com (Hons) from Delhi University. She is a merit holder of the Institute of Cost Accountants of India and a scholarship holder of the Institute of Chartered Financial Analyst of India.

### Prof. Manoj K. Pandey

#### Associate Professor (Insurance Business Management)



Prof. Manoj K. Pandey joined BIMTECH as an Associate Professor in December 2011, focusing on life insurance, distribution channels, and emerging technologies. He is a respected speaker and trainer and has conducted executive development programs for banking and insurance professionals. Between 2015 and 2020, he led the transformational branding and social media efforts at BIMTECH as Head of Admission & Corporate Communication.

Prof. Pandey also serves as an advisor to several organizations and is a member of key committees in three life insurance companies. He is part of the Academic Council of the Risk Management Association of India.

His career began in 1992 as a direct recruit officer with LIC of India, where he spent 14 years in various operational and marketing roles. He later became the Country Manager for LIC International in the Sultanate of Oman, overseeing operations abroad.

## Confirmation and Registration

- Nominations will be confirmed only after receipt of payment.
- Confirmations will be given on a first-come, first served.

