Bancassurance Management for Banks Training Course

Professional Development Training Course Outline

Category	Banking Institute	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

The Bancassurance Management for Banks training course is designed to equip banking professionals with advanced knowledge, practical skills, and strategic insights required to successfully integrate insurance products with banking services. As financial institutions embrace digital transformation, customer-centric banking, financial inclusion, risk management, embedded insurance, data analytics, AI-driven customer engagement, regulatory compliance, and cross-selling strategies, bancassurance has become one of the fastest-growing revenue channels in the global banking industry. This comprehensive program focuses on developing participants' competencies in designing profitable bancassurance models, strengthening customer relationships, increasing fee-based income, improving operational efficiency, and delivering exceptional customer experiences through innovative insurance solutions.

The course combines international best practices, real-world banking case studies, digital sales strategies, ESG considerations, customer journey mapping, CRM optimization, fraud prevention, cybersecurity awareness, financial planning, wealth management integration, omnichannel distribution, and performance analytics to enable participants to maximize business growth while ensuring regulatory compliance and ethical selling practices. Participants will gain practical exposure to modern bancassurance frameworks, emerging technologies, and market trends that are transforming the financial services landscape, enabling their institutions to remain competitive, sustainable, and customer-focused in today's dynamic banking environment.

Programme Curriculum

Bancassurance Management for Banks Training Course

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Course Duration

5 days

Course Objectives

By the end of this training program, participants will be able to:

1. Develop effective Bancassurance Business Strategies aligned with corporate banking objectives.
2. Increase Cross-Selling and Upselling opportunities through customer relationship management.
3. Enhance Customer Experience (CX) using digital engagement platforms.
4. Apply AI-Powered Customer Analytics for insurance sales optimization.
5. Design profitable Embedded Insurance solutions within banking products.
6. Strengthen Risk Management and Regulatory Compliance in bancassurance operations.
7. Improve Sales Performance Management using data-driven KPIs.
8. Utilize Digital Banking and Omnichannel Distribution for insurance delivery.
9. Implement Customer Journey Mapping to improve policy conversion rates.
10. Integrate CRM and Business Intelligence tools into bancassurance operations.
11. Apply Fraud Detection and Cybersecurity practices in insurance transactions.
12. Build sustainable revenue through Financial Inclusion and ESG Banking initiatives.
13. Develop comprehensive Strategic Action Plans for high-performing bancassurance programs.

Target Audience

1. Bank Branch Managers
2. Bancassurance Managers
3. Relationship Managers
4. Retail Banking Officers
5. Corporate Banking Professionals
6. Insurance Business Development Managers
7. Risk and Compliance Officers
8. Financial Advisors and Wealth Management Professionals

Course Modules

Module 1: Fundamentals of Bancassurance Management

- Evolution of Bancassurance Models
- Global Bancassurance Trends
- Banking–Insurance Business Integration
- Revenue Diversification Strategies
- Regulatory Environment
- **Case Study:** Successful bancassurance implementation by a leading international retail bank.

Module 2: Strategic Bancassurance Business Development

- Strategic Planning
- Business Model Innovation
- Market Segmentation
- Competitive Positioning
- Partnership Management
- **Case Study:** Building a profitable bank-insurance partnership.

Module 3: Customer-Centric Sales and Relationship Management

- Customer Journey Mapping
- Cross-Selling Techniques
- Customer Retention Strategies
- Digital Customer Engagement
- CRM Optimization
- **Case Study:** Increasing insurance penetration through customer analytics.

Module 4: Digital Transformation in Bancassurance

- Digital Banking Integration
- Embedded Insurance
- Artificial Intelligence Applications
- Big Data Analytics
- Omnichannel Customer Experience
- **Case Study:** AI-driven bancassurance sales transformation.

Module 5: Risk Management and Regulatory Compliance

- Enterprise Risk Management
- Insurance Compliance
- AML and KYC Requirements
- Fraud Prevention
- Cybersecurity Controls
- **Case Study:** Managing operational risk in bancassurance operations.

Module 6: Product Innovation and Insurance Solutions

- Life Insurance Products
- General Insurance Products
- Wealth Protection Solutions

- SME Insurance Products
- Product Packaging Strategies
- **Case Study:** Launching innovative bundled banking-insurance products.

Module 7: Performance Management and Business Analytics

- Sales KPIs
- Performance Dashboards
- Business Intelligence
- Predictive Analytics
- Continuous Improvement
- **Case Study:** Using analytics to improve bancassurance profitability.

Module 8: Future Trends and Strategic Leadership

- ESG and Sustainable Finance
- Open Banking
- FinTech Collaboration
- Digital Ecosystems
- Strategic Leadership in Bancassurance
- **Case Study:** Future-ready bancassurance transformation roadmap.

Training Methodology

- Interactive lectures and presentations.
- Group discussions and brainstorming sessions.
- Hands-on exercises using real-world datasets.
- Role-playing and scenario-based simulations.
- Analysis of case studies to bridge theory and practice.
- Peer-to-peer learning and networking.
- Expert-led Q&A sessions.
- Continuous feedback and personalized guidance.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call *+254769199797*

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Online	$1,000
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

Ready to enroll or request a customized program? Book online or contact us:

Register Online Now

Email: info@fineskilltrainingcenter.com | Website: www.fineskilltrainingcenter.com