

**ACADEMY FOR BFSI MANAGEMENT  
POST GRADUATE CERTIFICATE PROGRAMME IN MANAGEMENT  
IN BANKING, FINANCE & INSURANCE SECTOR.**

**100% JOBS GUARANTEED IN REPUTED BANKS ,FINANCE AND INSURANCE COMPANIES  
WITH A CTC OF MORE THAN RS.5 LAKHS PER ANNUM PLUS INCENTIVES.**

SIX MONTHS CLASSROOM TEACHING & SIX MONTHS PRACTICAL TRAINING IN THE INDUSTRY



**STARTING FROM : 18TH APRIL, 2020 AT POWAI,  
MUMBAI.**

**CLASSES WILL BE HELD FROM MONDAY TO  
THURSDAY FROM 6PM TO 9PM**

**WHO SHOULD ENROLL :**

Any Graduate who wishes to start his/ her career in the Insurance ,  
and wants to become a Marketing or Sales President one day should enroll.

**COURSE FEE:**

Rs.10,000/- per month or Rs. 1,20,000/- per annum.

**TEACHING METHODOLOGY**

Our Faculty use Case Studies, Role Plays, Management Games , Films, Simulation etc to provide experiential learning

Visit our website <http://www.sriiom.com>

Email : [sriiom@sriiom.com](mailto:sriiom@sriiom.com). Whatsapp : 9967137000 / Call :9967135051 / 022 - 49724684

## Overview:

The insurance industry and the Banking, Finance and Securities sector will grow exponentially in India as the economy grows at 7-8% year on year.

Having a well-developed insurance & BFSI sector that is evolving is critical to any country and its economic transformation.

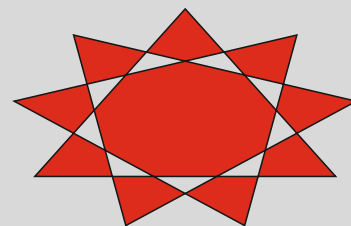
Our **Post Graduate Certificate Programme in Management** will look at equipping individuals with the perfect mix of conceptual knowledge and hands-on experience to help them start a successful career in this field.

If you are reading this, you may wish to be part of this rapidly growing Banking , Finance & Insurance industry that will make an important change in people's lives.

## Learning Architecture

1. Two Months : Self Management , Finishing School & Leadership Training
2. Three Months: Marketing, Sales Management & People Management
3. One month Finishing School for Spoken English, Grooming, Dressing, Etiquette and Image Management.
4. Six Months : Practical Training in the industry, On-line Coaching & Mentoring by us.
5. Expert Q&A Sessions
6. Live Scenarios
7. Dedicated Mentoring

**SRIIOM**  
Sri Ramakrishna  
International Institute  
of Management



## Methodology of Training.

All the subjects will be taught with the help of Practical Sessions, Role -Plays, Management Games, Simulation, Films, Project work, Demonstration etc.

## Evaluation:

A Learning Score Card will be maintained for each student in terms of Attendance, Class Participation, Marks obtained in Assignments , Book Reviews, Projects and Internship etc.

## Certification:

On successful completion of the theoretical and practical training each student will be awarded a Post Graduate Certificate Programme in Management in Insurance and BFSI Management.

## Attendance:

All students will have to maintain 75% attendance to get the Post Graduate Certificate in Management in Insurance and BFSI sector.

## Contact Us :

Sri Ramakrishna International Institute of Management ( SRIIOM )  
C - 4113 Oberoi Garden Estate, Chandivali Farm Road, Powai  
Mumbai - 400072 ( 1km from Saki Naka Metro )



## COURSE CONTENT FOR 6 MONTHS CLASSROOM TRAINING

### EFFECTIVE RELATIONSHIP MANAGEMENT

The first module focuses in enabling the student to expand the capacity body & mind, control one's emotions & feelings and learn skills in effective communication, presentation , human relations & Image Management etc.

Training Workshops will be conducted in major areas given below :

- ❖ Self - Mastery: In this module we will help the students to create a Career Plan so that they take responsibility and accountability of their life and strive towards reaching their destination.
- ❖ Relationship Management: We will teach all aspects of building effective winning relationships.
- ❖ Effective Communication Skills: We will provide training to plan the communication, improve listening skills and learn to communicate effectively so that client understand and internalizes the message.
- ❖ Presentation Skills : We will offer practical training in making powerful and interesting Powerpoint presentations with the right font and colour scheme and learn to use animation etc to make a powerful and great presentation.
- ❖ Human Relations : Central to any client servicing is maintaining a winning relationship. We will provide training how to win and influence people from Dale Carnegie Training theory.
- ❖ Time Management : Time Management is essence of every good relationship. We need to respect others time.
- ❖ Image Management : We provide training in Dressing, Grooming, Hairstyle, Body Odor, Etiquette, Manners which are required to demonstrate a sophisticated behavior to impress the client.

### MARKETING AND SALES MANAGEMENT

#### 1.Understanding Marketing Management:

- ❖ Defining Marketing for the 21st Century & Developing Marketing Strategies and Plans.

#### 2 . Capturing Marketing Insights:

- ❖ Gathering Information & scanning the environment.
- ❖ Conducting Marketing Research and forecasting demand.

#### 3.Connecting with Customers :

- ❖ Creating Customer Value
- ❖ Satisfaction and loyalty.
- ❖ Analyzing consumer markets and analyzing business markets.
- ❖ Identifying market segments and targets.

#### 4. Sales Management

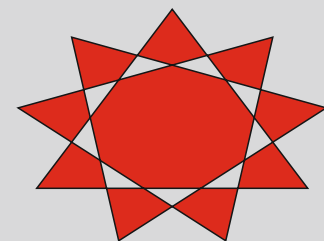
- ❖ How to open a Sales Call
- ❖ What to say during the sales call and how to close the Sale.
- ❖ Customer Relationship Management
- ❖ Institution and Corporate Sales / B2B Sales, B2G sales, B2C sales.
- ❖ Channel and Distribution Management

#### 5. Digital Marketing:

- ❖ Finding new avenues of digital marketing
- ❖ social Media Marketing

#### 6. Strategic Marketing:

- ❖ Michael Porters Five Forces Model and other practical model of strategic marketing.



**CONTENT FOR INSURANCE**

**1.INSURANCE BASICS**

Need, characteristics, and principles of insurance; common terms used in insurance,

**2. FINANCE BASICS**

Basic terms of finance - debt, equity, savings and investments; debt instruments,equity instruments, money market instruments and mutual funds as sources of...

**3.INTRODUCTION TO BANKING , FINANCE & INSURANCE INDUSTRY**

The age and income trends in the Indian demography and their impact on the potential of Banking, Finance & Life insurance industry in India; position of HDFC Bank, HDFC Life, ICICI Pru etc in the Indian life insurance industry

**4.YOUR CAREER GROWTH PROSPECTS IN THE INSURANCE INDUSTRY.**

What to expect from a life insurance sales career; distribution channels available with any Insurance company. Investments; steps in the financial planning process and the role of insurance in financial planning

**5.LIFE INSURANCE PLANS**

Different types of life insurance plans such as protection, savings and retirement plans; insurance product classification based on risk, through traditional and ULIP plans; terminology and charges in a ULIP plan.

**6.REGULATORY ENVIRONMENT**

Insurance regulations and role of regulatory authority; most important acts that regulate the insurance industry in India; principles and steps in the process of handling grievances

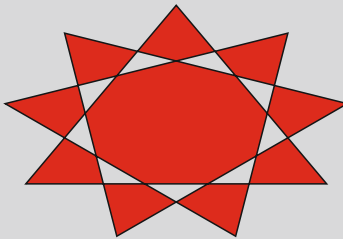
**COURSE :SELLING AN INSURANCE POLICY.**

**SELLING SKILLS**

Importance and necessity of sales in our lives; different stages of selling; sales techniques to increase overall sales value

**POLICY ISSUE AND SERVICING**

Complete process of on-boarding a client from login to conversion; mobility apps and their importance in the complete sales process; process of servicing an insurance policy



**BANKING AND FINANCIAL INSTITUTIONS**

- 1.Principles of Banking & Finance.
- 2.Principles of Accounting
- 3. Basics of Economics ( Macroeconomics and Microeconomic)
- 4. Principles of Corporate Finance
- 5. Capital Markets. - Derivatives, Commodities, Foreign Exchange Etc.
- 6. Investment Management.
- 7. Financial Intermediation.
- 8. Asset pricing and Financial Markets .
- 9. Statistics.
- 10. Mutual Funds, Foreign Exchange, Derivatives.
- 11. Stock Exchange Functioning and Trading.
- 12. IRDA guidelines.



## METHODOLOGY OF TRAINING :

The entire Post Graduate Certificate Programme in Management is taught through an experiential methodology both offline and online using Case -Studies, Films, Simulation, Projects Book Reviews etc.

## PROGRAMME DIRECTOR:

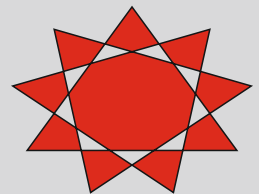
Ashoke k Maitra, M.A. TISS and Ph.D Stanford University, USA

## FACULTY :

1. Mr. Prasenjit Ghosh Roy : Faculty for Digital Marketing IIT /IIM ( bangalore ) Working at President level.
2. Mr. Sachin Umalkar : Faculty for Sales Management : MBA Marketing. Former G.M. Panasia Biotech
3. Mr. Atul Srivastava : Faculty for Insurance: CEO of a Company.
4. Mr. Sandeep Ohri : Faculty for Sales Management. Forr V.P. Sales Rolta.

Visiting Faculty on invitation, if available:

1. Mr. Manoj Jain M.D. Shriram Life Insurance
2. Mr. Fredrick Desouza : Former V.P. Insurance of HDFC Life Insurance.



**STARTING DATE :** 18th April 2020

**CLASSES WILL BE HELD FROM MONDAY TO THURSDAY FROM 6PM TO 9PM**

100% Placement guaranteed with minimum of Rs.5 Lakhs plus incentives in reputed Insurance and BFSI companies.

## PRACTICAL LEARNING THROUGH INTERNSHIP:

6 months internship with a company to pick up on the job skills. You will get jobs before you graduate.

## APPLY TO :

**SRIIOM**

Email : [sriiom@sriiom.com](mailto:sriiom@sriiom.com)

**Whatsapp : 9967137000**

**Call :9967135051 / 022 - 49724684**

SRIIOM has got the National Education Excellence Award  
& Education Award from Oxford University, U.K.

