



GUJARAT TECHNOLOGICAL UNIVERSITY
Syllabus for Bachelor of Vocation (B.Voc), 1st Semester
Branch: Banking Finance Services and Insurance
Subject Name: Insurance Agent
Subject Code: 1112107

**With effective
from academic
year 2019-20**

Teaching and Examination Scheme:

Teaching Scheme			Credits C	Examination Marks				Total Marks
L	P	OJT		Theory		Tutorial/Practical		
			University exams (ESE)	Progressive Assessment (PA)	External Practical/viva Exam (ESE)	Internal Evaluation Practical/viva Exam (PA)		
-	-	15	15	-	-	100	100	200

L- Lectures; P- Practical; OJT- On Job Training; C- Credit; ESE- End Semester Examination; PA- Progressive Assessment

Content:

Sr. No.	Content	Hrs.
1	Basics of Insurance : <ul style="list-style-type: none"> • Understand the concept of insurance and its advantages • Visualise how insurance works • Comprehend the concept of premium and how it is calculated • Differentiate between Life and General Insurance • 	50
2	Life Insurance and General Insurance: <ul style="list-style-type: none"> • Define Life Insurance • Overview of life insurance products • Learn the concept of General insurance & it's different products • Learn about KYC, documentation and application procedure • Learn about IRDA, Regulatory aspects and code of conduct • 	50
3	Sales Skills : <ul style="list-style-type: none"> • Learn how to identify client segment for insurance products • Understand the process of meeting the customer • Learn the art of approaching potential clients through various methods • Acquire the skills required to narrow down the need of the customer • Learn how to present the product to the customer as a solution to their need and close the sale • Look at the grooming standards & Etiquettes to be followed • 	50
4	Effective communication and customer satisfaction : <ul style="list-style-type: none"> • Learn how to build a rapport with the customer • Learn the art of active listening and paraphrasing effectively in order to understand the customer • Learn how to maintain a positive attitude, correct body language, dress code, gestures and etiquette • Understand work output requirements, and receive feedback with positive attitude • Learn the advantages of customer loyalty and satisfaction • 	50
	Total	200



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Course Outcomes:

After learning the course the students should be able to understand:

1. How to identify and quantify client needs and determine appropriate Insurance Product
2. How to sell life insurance and general insurance policies to individuals.
3. How to respond to any queries/ requirements