QUEST
Professional Center

PROFESSIONAL TRAINING COURSE

Course No. 1875

High-Performance Insurance Sales Management Training Course

INSURANCE SALES & DISTRIBUTION
INSURANCE & RISK MANAGEMENT

DURATION
5 Days

DELIVERY
Classroom

Course Overview

This professional training course provides a comprehensive and practical framework for managing high-performance insurance sales teams and achieving sustainable commercial growth. It focuses on the strategic, managerial, and operational capabilities required to improve sales productivity, strengthen customer acquisition, increase conversion rates, and build a disciplined, results-oriented insurance sales organization.

The course examines the complete insurance sales management cycle, from market segmentation and sales planning to prospecting, opportunity management, pipeline development, negotiation, closing, renewal, and customer retention. Participants will learn how to translate corporate growth objectives into clear sales strategies, targets, territories, account priorities, and measurable performance expectations.

A strong emphasis is placed on sales force effectiveness, including sales team structure, target setting, territory management, coaching, motivation, incentives, performance reviews, productivity analysis, and capability development. The course also addresses how sales managers can identify performance gaps, strengthen sales behaviors, improve conversion, and create a culture of accountability and continuous improvement.

The program further explores strategic account management, customer relationship development, cross-selling, up-selling, renewal management, sales analytics, forecasting, and the use of technology and data in insurance sales management. Participants will develop practical approaches for balancing sales growth, profitability, customer value, compliance, and responsible selling practices.

Objectives

- By the end of the course, participants will be able to:
- Analyze the key drivers of high-performance insurance sales organizations.
- Develop sales strategies aligned with insurance business growth and profitability objectives.
- Segment markets, customers, and prospects to prioritize sales opportunities.
- Establish effective sales targets, territories, quotas, and performance expectations.
- Build and manage high-quality insurance sales pipelines.

- Improve prospecting, qualification, conversion, negotiation, and closing effectiveness.
- Apply effective coaching and performance management techniques for insurance sales teams.
- Evaluate individual and team productivity using relevant sales performance indicators.
- Design incentive and recognition approaches that support sustainable sales performance.
- Strengthen cross-selling, up-selling, renewal, and customer retention strategies.
- Apply sales forecasting and analytics to improve commercial decision-making.
- Strengthen strategic account management and long-term customer relationships.
- Integrate compliance, customer protection, and responsible sales practices into sales management.
- Develop practical initiatives to improve sales productivity, profitability, and sustainable growth.

Who Should Attend

This course is designed for insurance professionals responsible for managing sales teams, distribution channels, customer acquisition, business development, and commercial performance. It is suitable for professionals working across life, health, property and casualty, corporate, commercial, retail, and specialty insurance environments.

It is particularly relevant for Insurance Sales Managers, Sales Directors, Distribution Managers, Branch Managers, Regional Sales Managers, Business Development Managers, Key Account Managers, Sales Supervisors, Agency Managers, Broker Relationship Managers, and professionals responsible for sales planning and performance management.

The course is also valuable for executives and decision makers responsible for insurance growth strategies, sales productivity, distribution profitability, customer acquisition, market expansion, and the development of high-performing commercial teams.

Learning Outcomes

- Upon completion of the course, participants will be able to:
- Explain the principles and characteristics of high-performance insurance sales management.
- Develop structured sales strategies based on market opportunities, customer needs, and business objectives.

- Segment customers and prospects and prioritize high-value opportunities.
- Establish effective sales targets, territories, quotas, and activity standards.
- Build and manage a disciplined insurance sales pipeline.
- Improve lead qualification, opportunity management, conversion, and closing rates.
- Conduct effective sales performance reviews and identify productivity gaps.
- Coach sales professionals to improve capability, behavior, and results.
- Design practical motivation, incentive, and recognition approaches.
- Strengthen cross-selling, up-selling, renewal, and customer retention performance.
- Manage strategic insurance accounts and develop long-term customer relationships.
- Use sales data, analytics, dashboards, and forecasting techniques to support decision-making.
- Identify sales risks, compliance issues, and customer conduct concerns.
- Develop corrective actions for underperforming sales teams, territories, and channels.
- Prepare an actionable sales improvement plan focused on productivity, profitability, customer value, and sustainable growth.

Course Outline

DAY 01

Insurance Sales Strategy & High-Performance Sales Management

- Fundamentals of high-performance insurance sales management.
- Strategic role of sales in insurance growth and profitability.
- Understanding insurance markets, customer segments, and competitive dynamics.
- Translating corporate objectives into sales strategies.
- Customer segmentation and opportunity prioritization.
- Developing insurance sales value propositions.
- Sales channel and territory strategy.
- Setting sales priorities and commercial objectives.
- Building a performance-oriented sales culture.
- Aligning sales growth with profitability and customer value.

DAY 01 — CONTINUED

> **PRACTICAL APPLICATION**
>
> Developing a strategic insurance sales plan for a selected market and customer segment.

DAY 02

Sales Planning, Pipeline Management & Conversion Optimization

- Insurance sales planning and target setting.
- Territory, account, and opportunity planning.
- Prospecting and lead generation strategies.
- Lead qualification and opportunity assessment.
- Building and managing insurance sales pipelines.
- Pipeline stages, probability, and opportunity prioritization.
- Conversion rate management.
- Managing sales activities and follow-up.
- Negotiation, objection handling, and closing techniques.
- Renewal and retention opportunities within the sales pipeline.

> **PRACTICAL APPLICATION**
>
> Building an insurance sales pipeline and developing actions to improve conversion at each stage.

DAY 03

Sales Force Performance, Coaching & Motivation

- Designing effective insurance sales team structures.
- Establishing individual and team performance expectations.
- Sales productivity and activity management.
- Performance indicators for insurance sales teams.
- Sales coaching and capability development.

DAY 03 — CONTINUED

- Conducting effective performance reviews.
- Identifying performance gaps and root causes.
- Managing high performers and underperforming sales professionals.
- Incentives, commissions, recognition, and motivation.
- Building accountability and continuous improvement.

PRACTICAL APPLICATION

Developing a sales team performance framework incorporating targets, KPIs, coaching, incentives, and corrective actions.

DAY 04

Strategic Accounts, Customer Relationships & Sales Growth

- Strategic account management in insurance.
- Building long-term relationships with corporate and high-value customers.
- Understanding customer needs and risk profiles.
- Consultative and value-based insurance selling.
- Cross-selling and up-selling strategies.
- Customer retention and renewal management.
- Managing customer portfolios and account profitability.
- Identifying new opportunities within existing accounts.
- Strengthening customer experience throughout the sales cycle.
- Managing key customer relationships and commercial risks.

PRACTICAL APPLICATION

Developing a strategic account growth plan covering customer needs, opportunities, products, relationships, retention, and profitability.

DAY 05

Sales Analytics, Forecasting & Sustainable Performance

- Insurance sales forecasting and revenue planning.
- Sales dashboards and performance reporting.
- Analyzing conversion, productivity, pipeline quality, retention, and profitability.
- Using data and analytics to improve sales decisions.
- Identifying trends, performance gaps, and early warning indicators.
- Linking sales performance with customer value and profitability.
- Responsible insurance sales and customer protection.
- Compliance and conduct risk in sales management.
- Developing sales improvement and transformation initiatives.
- Building sustainable high-performance sales organizations.

FINAL WORKSHOP

Developing an integrated high-performance insurance sales management plan covering strategy, segmentation, targets, territories, pipeline, conversion, team performance, coaching, incentives, strategic accounts, analytics, forecasting, customer retention, compliance, and continuous improvement.

Register or Request More Information

Course page: https://quest-training.com/courses/high-performance-insurance-sales-management-training-course
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