QUEST
Professional Center

PROFESSIONAL TRAINING COURSE

Course No. 1872

Insurance Distribution Strategy & Channel Management Training Course

INSURANCE SALES & DISTRIBUTION
INSURANCE & RISK MANAGEMENT

DURATION
5 Days

DELIVERY
Classroom

Course Overview

This comprehensive training course provides a strategic and practical framework for designing, managing, and optimizing insurance distribution strategies and channels. It focuses on how insurance organizations can expand market reach, improve channel productivity, strengthen customer access, and achieve sustainable growth through an effective and well-governed distribution model.

The course examines the full insurance distribution landscape, including direct sales, branches, agents, brokers, bancassurance, digital channels, affinity partnerships, corporate partnerships, and emerging distribution models. Participants will learn how to evaluate each channel according to customer segments, product characteristics, commercial objectives, cost structures, operational capabilities, and risk considerations.

Particular emphasis is placed on channel strategy, market segmentation, channel economics, territory planning, intermediary performance, channel conflict, customer journeys, digital transformation, and omnichannel distribution. Participants will explore how to determine the right distribution mix and allocate products, customers, resources, and investments across channels.

The course also addresses distribution governance, performance measurement, incentive structures, intermediary management, customer experience, compliance, conduct risk, and continuous optimization. Participants will develop practical approaches for building high-performing distribution networks that balance growth, profitability, customer value, operational efficiency, and risk management.

Objectives

- By the end of this course, participants will be able to:
- Analyze the strategic role of distribution in insurance growth and market competitiveness.
- Evaluate different insurance distribution channels and their commercial effectiveness.
- Develop an integrated insurance distribution strategy aligned with organizational objectives.
- Segment customers and match products and channels with customer needs.
- Optimize agency, broker, bancassurance, direct, partnership, and digital channels.

- Evaluate channel economics, cost-to-serve, productivity, and profitability.
- Establish effective channel performance indicators and management frameworks.
- Improve intermediary recruitment, development, engagement, and performance.
- Manage channel conflicts and optimize market and territory coverage.
- Design effective omnichannel and digital distribution strategies.
- Strengthen distribution governance, compliance, and conduct risk management.
- Develop continuous improvement and channel optimization plans.

Who Should Attend

This course is designed for insurance professionals responsible for distribution strategy, sales channels, business development, customer acquisition, and commercial performance. It is particularly suitable for distribution directors, channel managers, sales managers, agency managers, branch managers, and business development leaders.

It is also relevant for professionals managing agents, brokers, bancassurance relationships, strategic partnerships, direct sales, digital distribution, customer experience, product distribution, and intermediary networks.

The programme is especially valuable for executives and senior decision makers responsible for insurance growth strategy, distribution transformation, channel profitability, market expansion, customer access, and the development of high-performing distribution networks.

Learning Outcomes

- Upon completion of this course, participants will be able to:
- Explain the strategic foundations of insurance distribution management.
- Evaluate the strengths, limitations, costs, and risks of major distribution channels.
- Develop a distribution strategy aligned with business and customer objectives.
- Segment customers and determine the most appropriate distribution channels.
- Design effective agency and broker distribution models.
- Evaluate bancassurance and strategic partnership opportunities.

- Develop direct and digital distribution strategies.
- Analyze channel profitability, productivity, and cost-to-serve.
- Establish channel performance indicators and management dashboards.
- Improve intermediary performance and relationship management.
- Identify and resolve channel conflicts and distribution inefficiencies.
- Design effective omnichannel customer journeys.
- Strengthen distribution governance and conduct risk controls.
- Use data and analytics to optimize channel allocation and investment.
- Develop an integrated action plan for sustainable distribution growth.

Course Outline

DAY 01

Insurance Distribution Strategy & Market Positioning

- Strategic role of insurance distribution in business growth.
- Evolution of insurance distribution models.
- Understanding changing customer expectations and buying behavior.
- Market segmentation and target customer identification.
- Direct, agency, broker, bancassurance, partnership, and digital channels.
- Product-channel alignment.
- Distribution strategy and competitive positioning.
- Assessing market reach and channel coverage.
- Defining distribution objectives and strategic priorities.
- Building an integrated insurance distribution strategy.

PRACTICAL APPLICATION

Develop a distribution strategy for a selected insurance market and customer segment.

DAY 02

Channel Design, Economics & Network Optimization

- Designing effective insurance distribution networks.
- Agency and broker network structures.
- Branch and direct distribution management.
- Bancassurance and partnership distribution models.
- Digital distribution and online sales channels.
- Channel economics and cost-to-serve analysis.
- Channel profitability and productivity measurement.
- Territory and market coverage planning.
- Resource allocation across distribution channels.
- Managing channel overlap and conflict.

PRACTICAL APPLICATION

Evaluate an existing distribution network and develop a channel optimization plan.

DAY 03

Intermediary & Channel Performance Management

- Agent and broker recruitment and selection.
- Intermediary onboarding, development, and retention.
- Setting channel targets and performance expectations.
- Sales productivity and performance measurement.
- Incentives, commissions, and performance-based rewards.
- Managing underperforming channels and intermediaries.
- Relationship management and strategic partner development.
- Monitoring intermediary quality and customer service.
- Channel performance reviews and corrective actions.
- Building high-performing distribution networks.

DAY 03 — CONTINUED

> **PRACTICAL APPLICATION**
>
> Develop an intermediary performance management framework with targets, indicators, incentives, and corrective actions.

DAY 04

Digital, Omnichannel & Customer-Centric Distribution

- Digital transformation of insurance distribution.
- Online, mobile, and self-service insurance models.
- Designing omnichannel distribution strategies.
- Integrating traditional and digital channels.
- Customer journey mapping across distribution channels.
- Data-driven channel management.
- Customer behavior and channel preference analysis.
- Personalization and targeted distribution.
- Improving customer experience and channel convenience.
- Measuring digital and omnichannel performance.

> **PRACTICAL APPLICATION**
>
> Design an omnichannel customer journey for an insurance product and identify opportunities to improve customer acquisition and conversion.

DAY 05

Distribution Governance, Performance & Strategic Optimization

- Insurance distribution governance and accountability.
- Compliance, customer protection, and conduct risk.
- Managing operational and distribution risks.
- Channel performance dashboards and key indicators.
- Executive reporting and strategic performance reviews.
- Optimizing channel investment and resource allocation.

DAY 05 — CONTINUED

- Aligning distribution growth with profitability and risk appetite.
- Strategic planning for distribution transformation.
- Continuous improvement and channel optimization.
- Building a sustainable, high-performance distribution model.

> **FINAL WORKSHOP**
>
> Develop an integrated insurance distribution strategy covering market segmentation, channel selection, network design, intermediary management, channel economics, digital distribution, omnichannel customer experience, governance, performance measurement, investment priorities, and continuous improvement.

Register or Request More Information

Course page: https://quest-training.com/courses/insurance-distribution-strategy-channel-management-training-course
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