QUEST
Professional Center

PROFESSIONAL TRAINING COURSE

Course No. 1870

# Insurance Sales & Distribution Management Training Course

INSURANCE SALES & DISTRIBUTION
INSURANCE & RISK MANAGEMENT

DURATION
**5 Days**

DELIVERY
**Classroom**

LOCATION
**London, United Kingdom**

DATES
**28 Dec 2026 – 1 Jan 2027**

## Scheduled Event Details

| | |
|---|---|
| CITY | London, United Kingdom |
| DATE | 28 Dec 2026 – 1 Jan 2027 |
| DELIVERY TYPE | Classroom |
| COURSE FEE | €5,600 |

## Course Overview

This comprehensive training course provides a strategic and practical framework for managing insurance sales and distribution channels in an increasingly competitive and customer-focused insurance market. It focuses on how insurance organizations can build effective distribution strategies, improve sales performance, expand market reach, and create sustainable revenue growth.

The course examines the major insurance distribution models, including direct sales, agency networks, brokers, bancassurance, digital channels, partnerships, and emerging distribution models. Participants will learn how to evaluate the strengths, costs, risks, and performance of different channels and determine the most appropriate distribution mix for specific products, customer segments, and markets.

Strong emphasis is placed on sales strategy, channel management, customer segmentation, product positioning, sales performance measurement, incentive structures, pipeline management, and customer experience. The course also addresses how data and analytics can be used to identify opportunities, improve conversion rates, increase retention, and optimize distribution productivity.

Participants will further explore distribution governance, regulatory and conduct considerations, intermediary management, digital transformation, omnichannel strategies, and continuous performance improvement. The programme is designed to help insurance leaders and sales professionals build high-performing distribution organizations while balancing growth, profitability, customer value, and risk.

## Objectives

- By the end of this course, participants will be able to:
- Analyze the strategic role of sales and distribution in insurance growth.
- Evaluate insurance distribution channels and their commercial effectiveness.
- Develop customer-focused insurance sales and distribution strategies.
- Segment customers and align products and channels with market needs.
- Optimize agency, broker, bancassurance, direct, and digital distribution channels.
- Establish effective sales targets, performance indicators, and productivity measures.
- Improve sales pipeline management, conversion, cross-selling, and retention.
- Design effective incentive and performance management approaches for distribution teams.
- Apply data and analytics to improve channel performance and sales decisions.
- Strengthen intermediary relationships and distribution governance.
- Integrate digital and traditional channels into an effective omnichannel model.
- Develop continuous improvement strategies for insurance sales and distribution performance.

## Who Should Attend

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

It is also relevant for professionals managing brokers, agents, bancassurance relationships, partnerships, direct sales teams, digital channels, customer experience, marketing, and product distribution.

The programme is particularly valuable for executives, senior managers, and decision makers responsible for developing insurance growth strategies, optimizing distribution networks, improving sales productivity, and balancing customer acquisition, profitability, service quality, and regulatory requirements.

## Learning Outcomes

- Upon completion of this course, participants will be able to:
- Explain the strategic foundations of insurance sales and distribution management.
- Evaluate the performance and suitability of different distribution channels.
- Develop channel strategies aligned with insurance products and customer segments.
- Design effective customer segmentation and channel allocation approaches.
- Manage agency and broker networks more effectively.
- Evaluate bancassurance and partnership distribution models.
- Develop digital and omnichannel distribution strategies.
- Establish sales targets and meaningful sales performance indicators.
- Analyze sales pipelines, conversion rates, productivity, and retention.
- Improve cross-selling, up-selling, customer acquisition, and customer retention.
- Design effective incentive and commission structures.
- Use sales and distribution analytics to support management decisions.
- Strengthen intermediary performance, governance, and relationship management.
- Identify distribution risks, conduct issues, and operational weaknesses.
- Develop an integrated action plan for improving insurance sales and distribution performance.

## Course Outline

DAY 01

### Insurance Sales & Distribution Strategy

- Strategic role of sales and distribution in the insurance business.
- Insurance market dynamics and changing customer expectations.
- Insurance distribution models and market structures.
- Direct sales and branch distribution.
- Agency and broker distribution.
- Bancassurance and strategic partnerships.
- Digital and online insurance distribution.
- Customer segmentation and channel selection.

DAY 01 — CONTINUED

- Product-channel alignment.
- Developing an integrated insurance distribution strategy.

> **PRACTICAL APPLICATION**
>
> Assess an insurance company's current distribution model and identify strategic growth opportunities.

DAY 02

## Channel Management & Distribution Network Optimization

- Designing and managing insurance distribution networks.
- Agency recruitment, onboarding, development, and retention.
- Broker relationship and performance management.
- Bancassurance partnership management.
- Managing direct sales and branch performance.
- Digital channel development and optimization.
- Channel economics and cost-to-serve analysis.
- Territory and market coverage planning.
- Managing channel conflicts and overlap.
- Distribution capacity and productivity optimization.

> **PRACTICAL APPLICATION**
>
> Develop a channel optimization plan for an insurance distribution network.

DAY 03

## Sales Performance, Customer Acquisition & Retention

- Building effective insurance sales strategies.
- Setting sales targets and commercial objectives.
- Sales pipeline management.
- Lead generation and qualification.

DAY 03 — CONTINUED

- Conversion rate improvement.
- Cross-selling and up-selling insurance products.
- Customer acquisition cost and customer lifetime value.
- Customer retention and renewal strategies.
- Sales productivity and performance management.
- Designing sales incentives and commission structures.

> **PRACTICAL APPLICATION**
>
> Analyze a sales pipeline and develop an action plan to improve conversion, productivity, and customer retention.

DAY 04

## Digital Distribution, Analytics & Customer Experience

- Digital transformation of insurance sales and distribution.
- Online sales and self-service insurance models.
- Mobile and digital customer journeys.
- Omnichannel insurance distribution.
- Using data and analytics for sales decisions.
- Customer behavior and distribution analytics.
- Identifying high-value customer and market opportunities.
- Personalization and targeted insurance offers.
- Improving customer experience across distribution channels.
- Measuring digital and omnichannel performance.

> **PRACTICAL APPLICATION**
>
> Design an omnichannel customer journey for an insurance product and identify opportunities for digital sales improvement.

DAY 05

# Distribution Governance, Leadership & Continuous Improvement

- Governance of insurance sales and distribution.
- Managing conduct, compliance, and customer protection considerations.
- Distribution risk management.
- Monitoring intermediary quality and performance.
- Sales and distribution dashboards and key performance indicators.
- Executive reporting and performance reviews.
- Aligning sales growth with profitability and risk appetite.
- Building high-performing distribution teams.
- Strategic planning for sustainable distribution growth.
- Continuous improvement and distribution transformation.

> **FINAL WORKSHOP**
>
> Develop an integrated insurance sales and distribution strategy covering channel selection, customer segmentation, distribution network design, sales targets, incentives, digital channels, analytics, customer experience, governance, performance measurement, and continuous improvement.

## Register or Request More Information

Course page: https://quest-training.com/courses/insurance-sales-distribution-management-training-course
Website: https://quest-training.com
Email: info@quest-training.com
Phone: +905016771440