QUEST
Professional Center

PROFESSIONAL TRAINING COURSE

Course No. 1997

Strategic Insurance Distribution & Brokerage Training Course

INSURANCE BROKING & INTERMEDIARY MANAGEMENT
INSURANCE & RISK MANAGEMENT

DURATION
5 Days

DELIVERY
Classroom

Course Overview

The Strategic Insurance Distribution & Brokerage Training Course provides a comprehensive strategic and practical framework for managing insurance distribution channels, strengthening brokerage performance, and developing sustainable growth strategies across competitive insurance markets. The course examines how insurers and brokers can optimize distribution models, improve intermediary relationships, enhance customer value, and align distribution activities with broader business objectives.

Participants will explore the full insurance distribution lifecycle, including channel strategy, broker and intermediary segmentation, market positioning, distribution planning, client acquisition, portfolio development, retention, placement strategies, insurer relationships, and service delivery. Particular emphasis is placed on selecting and managing the right distribution channels while balancing commercial performance, customer expectations, regulatory requirements, and operational risk.

The program also addresses strategic brokerage management, including broker value propositions, portfolio profitability, remuneration structures, negotiation strategies, intermediary performance management, business development, and relationship governance. Participants will learn how to evaluate distribution effectiveness using relevant performance indicators and analytical approaches to support informed commercial decisions.

Through practical case studies, industry scenarios, workshops, and strategic exercises, participants will develop the ability to assess existing distribution models, identify improvement opportunities, manage intermediary relationships, and build actionable strategies for sustainable insurance distribution and brokerage growth.

Objectives

- By the end of the course, participants will be able to:
- Analyze the strategic role of insurance distribution and brokerage within the insurance value chain.
- Evaluate different insurance distribution channels and their commercial and operational implications.
- Develop effective distribution strategies aligned with organizational objectives and target markets.

- Segment brokers, agents, intermediaries, and distribution partners according to strategic value and risk.
- Assess market opportunities and identify potential areas for distribution growth.
- Design effective broker and intermediary selection, onboarding, and relationship management approaches.
- Evaluate brokerage portfolios using profitability, retention, growth, service, and performance indicators.
- Apply negotiation strategies for insurer, broker, intermediary, and commercial relationships.
- Develop approaches for improving client acquisition, retention, cross-selling, and portfolio development.
- Strengthen intermediary performance management through structured objectives, service standards, and performance measures.
- Evaluate remuneration, commission, and incentive structures from both commercial and governance perspectives.
- Identify operational, conduct, regulatory, reputational, and third-party risks within distribution networks.
- Apply governance and control mechanisms to strengthen distribution and brokerage activities.
- Use distribution data and performance analytics to support strategic decision-making.
- Assess digital distribution opportunities and their impact on brokerage and customer engagement.
- Develop an integrated insurance distribution and brokerage improvement strategy.

Who Should Attend

This course is designed for insurance professionals responsible for distribution, brokerage, intermediary management, business development, client relationships, portfolio management, and commercial performance. It is particularly relevant to insurance distribution managers, brokerage managers, broker relationship managers, intermediary managers, account managers, placement specialists, client service professionals, portfolio managers, and business development professionals.

It is also suitable for senior professionals working in underwriting, claims, operations, finance, compliance, risk management, governance, legal and regulatory affairs, customer experience, digital transformation, and strategic planning who need a stronger understanding of insurance distribution and brokerage strategy.

The program is highly relevant to professionals working within insurance companies, insurance brokers, reinsurance brokers, banks, financial institutions, government entities, corporate insurance departments, multinational organizations, and large enterprises where effective insurance distribution and intermediary management are critical to commercial performance and risk management.

Learning Outcomes

- Upon successful completion of the course, participants will be able to:
- Map and evaluate the organization’s current insurance distribution model.
- Identify strengths, weaknesses, opportunities, and risks across distribution channels.
- Build structured segmentation models for brokers and other intermediaries.
- Establish criteria for selecting, appointing, and developing distribution partners.
- Develop broker relationship strategies based on commercial value and strategic importance.
- Assess portfolio performance using growth, profitability, retention, and service indicators.
- Identify opportunities to improve customer acquisition and retention through distribution channels.
- Prepare effective strategies for broker and intermediary negotiations.
- Evaluate commission and remuneration arrangements against commercial objectives and governance requirements.
- Establish practical intermediary performance frameworks and service standards.
- Identify and manage key risks associated with third-party distribution relationships.
- Strengthen documentation, governance, oversight, and accountability across distribution activities.
- Use business intelligence and distribution analytics to identify performance trends and opportunities.
- Evaluate the role of digital channels, automation, and technology in modern insurance distribution.
- Develop strategic responses to changing customer expectations and market competition.
- Prepare an actionable insurance distribution and brokerage strategy for organizational implementation.

Course Outline

DAY 01

Strategic Insurance Distribution & Market Positioning

- The role of distribution in the insurance value chain
- Insurance distribution models and channel structures
- Direct, broker, agent, bancassurance, digital, and partnership channels
- Distribution strategy and organizational business objectives
- Market segmentation and target customer analysis
- Competitive positioning in insurance distribution
- Distribution economics and key commercial drivers
- Identifying growth opportunities across customer and market segments
- Distribution channel performance assessment
- Strategic insurance distribution planning

PRACTICAL APPLICATION:

- Participants assess a hypothetical insurance distribution model and identify strategic opportunities, channel gaps, and priorities for improvement.

DAY 02

Brokerage Strategy, Intermediary Management & Relationship Development

- Strategic role of insurance brokers and intermediaries
- Broker and intermediary segmentation
- Selection, qualification, and appointment of distribution partners
- Broker onboarding and relationship frameworks
- Managing strategic versus transactional intermediary relationships
- Broker value propositions and service differentiation
- Intermediary relationship planning
- Portfolio development through broker networks

DAY 02 — CONTINUED

- Broker retention and relationship strengthening
- Managing conflicts of interest and conduct considerations
- Intermediary performance expectations and service standards

PRACTICAL APPLICATION:

- Participants develop an intermediary segmentation and relationship management framework for a selected insurance portfolio.

DAY 03

Commercial Performance, Placement & Negotiation

- Insurance placement strategy and market engagement
- Broker-led placement processes
- Understanding insurer and intermediary commercial interests
- Negotiation preparation and commercial positioning
- Negotiating terms, pricing, commissions, service levels, and responsibilities
- Managing difficult commercial negotiations
- Commission and remuneration structures
- Portfolio profitability and commercial performance
- Client acquisition, retention, and cross-selling opportunities
- Measuring broker contribution and distribution effectiveness
- Managing renewal pipelines and portfolio opportunities

PRACTICAL APPLICATION:

- Participants conduct a simulated broker negotiation covering commercial terms, service expectations, remuneration, and portfolio development.

DAY 04

Distribution Risk, Governance, Compliance & Customer Protection

- Distribution and intermediary risk frameworks
- Regulatory and compliance considerations in insurance distribution
- Conduct risk and customer protection
- Disclosure, transparency, and professional standards
- Conflicts of interest and remuneration-related risks
- Third-party and intermediary risk management
- Operational and documentation risks
- Data protection and information security considerations
- Complaints and customer issue management
- Governance, oversight, monitoring, and escalation
- Distribution controls and compliance assurance

PRACTICAL APPLICATION:

- Participants evaluate an intermediary risk scenario, identify control weaknesses, and develop corrective actions and governance measures.

DAY 05

Digital Distribution, Analytics & Strategic Performance Improvement

- Digital transformation of insurance distribution
- Digital brokerage and online customer acquisition
- Technology-enabled intermediary management
- Automation of distribution and brokerage processes
- Customer experience across insurance distribution channels
- Distribution performance dashboards and key indicators
- Analytics for broker, channel, and portfolio management
- Measuring growth, retention, profitability, and service performance

DAY 05 — CONTINUED

- Distribution strategy reviews and continuous improvement
- Building a high-performance distribution culture
- Developing sustainable brokerage growth strategies

FINAL WORKSHOP:

- Participants develop an integrated Strategic Insurance Distribution & Brokerage Improvement Plan covering distribution strategy, channel priorities, intermediary segmentation, relationship management, commercial performance, risk controls, digital opportunities, performance indicators, and implementation priorities.

Register or Request More Information

Course page: https://quest-training.com/courses/strategic-insurance-distribution-brokerage-training-course
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