QUEST
Professional Center

PROFESSIONAL TRAINING COURSE

Course No. 1871

Strategic Insurance Sales Training Course

INSURANCE SALES & DISTRIBUTION
INSURANCE & RISK MANAGEMENT

DURATION **5 Days**	DELIVERY **Classroom**
LOCATION **Kuala Lumpur, Malaysia**	DATES **21 – 25 Dec 2026**

Scheduled Event Details

CITY	Kuala Lumpur, Malaysia
DATE	21 – 25 Dec 2026
DELIVERY TYPE	Classroom
COURSE FEE	€4,400

Course Overview

This comprehensive training course provides a strategic and practical approach to insurance sales, focusing on how sales professionals and managers can build sustainable revenue growth, improve customer acquisition, strengthen client relationships, and increase the profitability of insurance portfolios.

The course moves beyond traditional selling techniques by integrating sales strategy with customer needs, insurance product positioning, market segmentation, value-based selling, relationship management, and commercial decision-making. Participants will learn how to identify high-value opportunities and develop sales approaches that create measurable value for both customers and insurance organizations.

Particular emphasis is placed on strategic prospecting, consultative selling, needs analysis, opportunity qualification, sales pipeline management, negotiation, objection handling, cross-selling, up-selling, customer retention, and renewal strategies. The programme also examines how sales teams can use customer data and performance analytics to improve conversion rates and sales productivity.

Participants will also develop practical approaches to managing strategic accounts, building long-term customer relationships, improving sales performance, and aligning sales activities with organizational objectives. The course is designed for insurance professionals who want to move from transactional selling toward a structured, customer-centric, and commercially focused sales model.

Objectives

- By the end of this course, participants will be able to:
- Analyze the strategic role of insurance sales in organizational growth and profitability.
- Develop customer-focused insurance sales strategies aligned with market opportunities.
- Identify and prioritize high-value prospects and target customer segments.
- Apply consultative and value-based selling approaches to insurance products.
- Conduct effective customer needs and risk assessments.
- Develop structured sales pipelines and opportunity management processes.
- Improve conversion rates through effective qualification and sales planning.
- Strengthen negotiation, objection handling, and closing techniques.
- Apply cross-selling and up-selling strategies to increase customer value.
- Improve customer retention, renewal, and relationship management.
- Use sales performance data and analytics to support commercial decisions.
- Develop strategic sales action plans and performance improvement initiatives.

Who Should Attend

This course is designed for insurance sales professionals, account managers, relationship managers, business development specialists, and professionals responsible for acquiring and retaining insurance customers.

It is particularly relevant for sales managers, branch managers, insurance advisers, corporate account managers, key account managers, brokers, agency managers, and professionals working with corporate, commercial, retail, and institutional insurance clients.

The programme is also suitable for senior managers and executives responsible for insurance revenue growth, customer strategy, sales performance, strategic accounts, and commercial development who want to strengthen the strategic capabilities of their sales teams.

Learning Outcomes

- Upon completion of this course, participants will be able to:
- Explain the strategic foundations of high-performing insurance sales.
- Develop sales strategies aligned with customer needs and business objectives.
- Segment markets and identify high-value customer opportunities.
- Build effective prospecting and customer acquisition strategies.
- Conduct structured customer needs and risk assessments.
- Apply consultative selling and value-based sales techniques.
- Qualify opportunities and prioritize sales activities effectively.
- Manage sales pipelines and improve opportunity conversion.
- Handle customer objections and conduct effective negotiations.
- Develop cross-selling and up-selling opportunities across insurance products.
- Strengthen customer relationships and strategic account management.
- Improve renewal and customer retention performance.
- Use sales indicators and analytics to evaluate individual and team performance.
- Develop action plans to improve sales productivity and profitability.
- Apply strategic sales principles to complex insurance sales scenarios.

Course Outline

DAY 01

Strategic Foundations of Insurance Sales

- The strategic role of insurance sales in growth and profitability.
- Understanding the modern insurance customer.
- Insurance market dynamics and competitive positioning.
- Customer segmentation and target market selection.
- Identifying high-value customer segments.
- Insurance product positioning and value propositions.
- From product selling to customer-value selling.
- Developing customer-centric sales strategies.

DAY 01 — CONTINUED

- Aligning sales objectives with organizational strategy.
- Building a strategic insurance sales plan.

> **PRACTICAL APPLICATION**
>
> Develop a strategic sales plan for a selected insurance market or product.

DAY 02

Prospecting, Needs Analysis & Consultative Selling

- Strategic prospecting and opportunity identification.
- Building effective prospecting channels.
- Lead generation and qualification.
- Customer needs discovery and questioning techniques.
- Assessing customer risks, priorities, and insurance requirements.
- Consultative selling approaches for insurance products.
- Building customer-specific value propositions.
- Communicating insurance benefits and business value.
- Managing complex customer needs and multiple stakeholders.
- Prioritizing high-potential opportunities.

> **PRACTICAL APPLICATION**
>
> Conduct a structured customer needs assessment and develop a tailored insurance solution.

DAY 03

Sales Pipeline, Negotiation & Closing

- Designing and managing an effective insurance sales pipeline.
- Opportunity qualification and prioritization.
- Sales forecasting and activity planning.
- Managing different stages of the sales cycle.
- Building persuasive insurance proposals.

DAY 03 — CONTINUED

- Negotiation principles and commercial positioning.
- Handling objections and customer concerns.
- Managing price and value discussions.
- Closing techniques for complex insurance sales.
- Maintaining control of the sales process.

PRACTICAL APPLICATION

Manage a complete insurance sales opportunity from qualification through negotiation and closing.

DAY 04

Customer Retention, Cross-Selling & Strategic Accounts

- Customer retention as a strategic sales objective.
- Understanding customer lifetime value.
- Renewal planning and retention strategies.
- Cross-selling complementary insurance products.
- Up-selling and increasing customer coverage.
- Identifying account expansion opportunities.
- Strategic account management.
- Building long-term relationships with corporate and institutional clients.
- Managing key stakeholders and decision makers.
- Measuring customer satisfaction and relationship performance.

PRACTICAL APPLICATION

Develop a strategic account growth and customer retention plan.

DAY 05

Sales Performance, Analytics & Strategic Execution

- Insurance sales performance management.
- Key sales performance indicators.
- Measuring conversion, productivity, revenue, and profitability.
- Using sales data and analytics for decision-making.
- Identifying sales performance gaps.
- Coaching and developing high-performing sales teams.
- Aligning individual sales activities with strategic objectives.
- Developing sales improvement initiatives.
- Building sustainable sales growth strategies.
- Creating personal and organizational sales action plans.

FINAL WORKSHOP

Develop an integrated strategic insurance sales plan covering market segmentation, prospecting, customer needs analysis, value proposition, pipeline management, negotiation, closing, cross-selling, retention, strategic accounts, performance measurement, and continuous improvement.

Register or Request More Information

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