INSTEP

Insurance Sector Talent Enrichment Programme: Industry On-Boarding

5 DAYS PROGRAMME

TRAINING MODE:
Face to face (F2F) or Virtual

35 TRAINING HOURS

Proficiency Level: Novice

FSF
FUTURE SKILLS FRAMEWORK
MALAYSIA

32 Prime Skills
7 Power Skills

PROGRAMME OVERVIEW

This Programme is designed to equip new employees with the essential knowledge and skills they need to succeed in the insurance industry. This comprehensive programme aims to provide a foundational understanding of insurance principles, operational workflows, and the specific functions of various departments within the organisation.

Programme Objective

- To introduce new joiners to the core concepts of insurance, including types of insurance, key terminology, and regulatory considerations.

- To familiarise them with the operational flow within the organisation, highlighting the interconnectedness of different functions.

- To provide insights into each department's roles and responsibilities, ensuring a well-rounded understanding of how the organisation operates.

Target Audience

New Hire / Fresh Graduates

Programme Fee

RM2,000 per participants
Inclusive:
- Registration, Exam, and Self Registration Fee for CAii (Self-Study)
- AII Affiliate / Ordinary Membership Fee (1 Year)

In-House Programme
Minimum   : 20 participants
Maximum   : 30 participants

PROGRAMME CONTENT

Module	Content
Module 1: **Know Yourself**	**Setting the Mindset for Success** (Duration: 1 day) Trainer: Dr. Tan Zi Ning (Ph.D.) 1. Understanding Self-Mastery 2. Building a Growth Mindset 3. Emotional Intelligence 4. Building Resilience 5. Effective Communication 6. Positive Thinking, Self-Confidence, and Self Esteem 7. Creating a Personal Development Plan
Module 2: **Know Insurance**	**Insurance Fundamentals** (Duration: 2 Days) Trainer: Jasdeep Singh 1. Insurance Industry Overview 2. Principles of Insurance 3. Ethics, Compliance & the Regulatory Framework 4. Insurance Market Structure 5. Insurance Lifecycle – From Quotation to Claims 6. Digital Transformation in the Insurance Industry 7. Sustainability and ESG in Insurance 8. Customer Service Excellence 9. Basics of Life/ General Insurance 10. Regulatory & Compliance 11. Life/ General Insurance Products and Policies 12. Underwriting 13. Claims

PROGRAMME CONTENT

Module	Content

Module 3:
 	
Knowing Your Customers
	Customer Service Excellence
	(Duration: 1 Day)
	Trainer: Jasdeep Singh
	
	1. Understanding Customer Service
	2. Exploring the 6 Levels of Customer Service
	3. Serving your Internal Customers
	   • Importance on serving internal clients right
	   • How it impacts external service
	   • Strategies for internal service excellence
	4. Customer Feedback & Service Recovery
	5. Serving your External Customers
	   • Strategies for providing exceptional service to external clients
	   • Aligning with the 6 levels of service
	6. Building a Customer Centric Culture
	7. Implementing Service Standards

Module 4: **Knowing the Future**	**Getting Future Ready** (Duration:1 Day) Trainer: Dr. Daniel Chang 1. Technology in Insurance – Overview of Current Technology and Future Trends 2. Digital Transformation – Definition and Impact, Steps to Digital transformation 3. Insurtech Innovations – Definitions, Importance and Key Insurtech solutions 4. Leveraging on Generative AI – Basics of Gen AI, Application in Insurance, Prompt Engineering to Effective Leveraging on Gen AI 5. Data Analytics in Insurance – Importance, Tools & Techniques 6. Cybersecurity Awareness – Basics and Best Practices 7. Customer Experience in the Digital Age – Digital Tools to Enhance Engagement 8. ESG – Key Principles, Embedding and Implementing ESG strategies 9. Agile and Adaptive Thinking 10. Soft Skills for the Future Workplace

TRAINER PROFILE

Dr. Tan Zi Ning

Dr. Tan Zi Ning is an accomplished professional with a robust academic foundation and extensive expertise in coaching, training, and consulting. She holds a Ph.D. in Biomedicine from Universiti Sains Malaysia (USM) and is recognised as a Fellow of the Life Management Institute (FLMI).

In her professional journey, Dr. Tan has achieved certifications as an NLP Coach, NLP Trainer, and Neuroscience Coach, among others, reflecting her dedication to empowering individuals and organisations. With over a decade of experience, she has excelled as an agency director, insurance business coach, and health science lecturer.

Dr. Tan is passionate about driving personal and professional growth through her leadership at the Optimum Performance Academy, combining her scientific expertise with innovative coaching methodologies.

Jasdeep Singh

Jasdeep Singh has been in the insurance industry for more than 25 years. He has vast experiences in almost all departments within an insurance organisation. He started his career with MBF Insurans Sdn Bhd in 1987 as their Risk Surveyor and moved up quickly to be their Underwriting Manager. He subsequently headed their Management Information System Department where he successfully helped to implement Motor and Fire computer system using the state-of-the-art information technology driven by Sybase on Unix.

Jasdeep then moved to join American Home Assurance Company, a subsidiary of American International Group (AIG) in 1997. Through his creativity and professionalism, he was promoted as the Vice President, Profit Center Manager for Personal Lines Division. He later took on additional responsibilities as their Country Branch Manager.

Dr. Daniel Chang

Dr. Daniel, a seasoned business development, sustainability, and investment professional, holds a DBA focused on ESG's influence on private investment policy and an MBA in E-Commerce. He is pursuing a second PhD in Mathematical Science and investigates green growth public policy.

As an Accredited HRDC Trainer and Chief Sustainability Officer, he has led sustainability strategies, ESG compliance, and circular economy initiatives. With extensive expertise in business modelling, industrial 4.0, and corporate training across ASEAN and MENA, he empowers organisations with tailored, impactful ESG insights.

SFS SKILLS

FSF
FUTURE SKILLS FRAMEWORK
MALAYSIA

32 Prime Skills
7 Power Skills
Proficiency Level: Novice

Skills Developed by Attending this Programme

Prime Skills

Customer Experience Management	1. Account management 2. Customer acquisition and retention management 3. Customer experience design	4. Customer profiling 5. Customer relationship management 6. Customer screening and onboarding
Digital and Data Integration	7. Marketing 8. Pricing strategy 9. Product advisory	10. Sales target management 11. Underwriting management
Financial Products and Services	12. Marketing 13. Pricing strategy 14. Product advisory	15. Sales target management 16. Underwriting management
Growth and Partnerships	17. Business opportunities development 18. Business planning and needs analysis	19. Disruption management 20. Global perspectives 21. Market profiling
Investment & Financial Management	22. Insurance claims processing 23. Internal control	
Procurement Management	24. Category management	
Risk Management, Governance and Regulatory Compliance	25. Anti-Money laundering 26. Artificial intelligence, ethics, and system governance 27. Internal governance	28. Regulatory compliance 29. Risk governance 30. Sustainability risk management
Sustainable Finance and Insurance	31. Non financial industry sustainability development	32. Sustainable insurance and reinsurance solutions and applications

Power Skills

Innovation & Delivery	1. Adaptability and resiliency 2. Business acumen 3. Digital fluency	4. Innovative thinking 5. Learning agility
Social Intelligence	6. Communication 7. Empathy	

REGISTER NOW

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