

# 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



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)
- All Affiliate / Ordinary Membership Fee (1 Year)

In-House Programme

Minimum : 20 participants

Maximum : 30 participants

# PROGRAMME CONTENT

| Module  | Content  |
|---|--|
| <b>Module 1:</b><br><br><b>Know Yourself</b>  | <b>Setting the Mindset for Success</b><br>(Duration: 1 day)<br>Trainer: Dr. Tan Zi Ning (Ph.D.)<br><br><ol style="list-style-type: none"><li>1. Understanding Self-Mastery</li><li>2. Building a Growth Mindset</li><li>3. Emotional Intelligence</li><li>4. Building Resilience</li><li>5. Effective Communication</li><li>6. Positive Thinking, Self-Confidence, and Self Esteem</li><li>7. Creating a Personal Development Plan</li></ol>   |
| <b>Module 2:</b><br><br><b>Know Insurance</b> | <b>Insurance Fundamentals</b><br>(Duration: 2 Days)<br>Trainer: Jasdeep Singh<br><br><ol style="list-style-type: none"><li>1. Insurance Industry Overview</li><li>2. Principles of Insurance</li><li>3. Ethics, Compliance &amp; the Regulatory Framework</li><li>4. Insurance Market Structure</li><li>5. Insurance Lifecycle – From Quotation to Claims</li><li>6. Digital Transformation in the Insurance Industry</li><li>7. Sustainability and ESG in Insurance</li><li>8. Customer Service Excellence</li><li>9. Basics of Life/ General Insurance</li><li>10. Regulatory &amp; Compliance</li><li>11. Life/ General Insurance Products and Policies</li><li>12. Underwriting</li><li>13. Claims</li></ol> |

# PROGRAMME CONTENT

| Module  | Content  |
|---|--|
| <b>Module 3:</b><br><br><b>Knowing Your Customers</b> | <b>Customer Service Excellence</b><br>(Duration: 1 Day)<br>Trainer: Jasdeep Singh<br><ol style="list-style-type: none"><li>1. Understanding Customer Service</li><li>2. Exploring the 6 Levels of Customer Service</li><li>3. Serving your Internal Customers<ul style="list-style-type: none"><li>• Importance on serving internal clients right</li><li>• How it impacts external service</li><li>• Strategies for internal service excellence</li></ul></li><li>4. Customer Feedback &amp; Service Recovery</li><li>5. Serving your External Customers<ul style="list-style-type: none"><li>• Strategies for providing exceptional service to external clients</li><li>• Aligning with the 6 levels of service</li></ul></li><li>6. Building a Customer Centric Culture</li><li>7. Implementing Service Standards</li></ol>   |
| <b>Module 4:</b><br><br><b>Knowing the Future</b>     | <b>Getting Future Ready</b><br>(Duration: 1 Day)<br>Trainer: Dr. Daniel Chang<br><ol style="list-style-type: none"><li>1. Technology in Insurance – Overview of Current Technology and Future Trends</li><li>2. Digital Transformation – Definition and Impact, Steps to Digital transformation</li><li>3. Insurtech Innovations – Definitions, Importance and Key Insurtech solutions</li><li>4. Leveraging on Generative AI – Basics of Gen AI, Application in Insurance, Prompt Engineering to Effective Leveraging on Gen AI</li><li>5. Data Analytics in Insurance – Importance, Tools &amp; Techniques</li><li>6. Cybersecurity Awareness – Basics and Best Practices</li><li>7. Customer Experience in the Digital Age – Digital Tools to Enhance Engagement</li><li>8. ESG – Key Principles, Embedding and Implementing ESG strategies</li><li>9. Agile and Adaptive Thinking</li><li>10. Soft Skills for the Future Workplace</li></ol> |

# 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.

# FSF SKILLS



32 Prime Skills  
7 Power Skills  
Proficiency Level: Novice

## Skills Developed by Attending this Programme

### Prime Skills

|   |  |  |
|---|--|--|
| Customer Experience Management                        | <ol style="list-style-type: none"> <li>1. Account management</li> <li>2. Customer acquisition and retention management</li> <li>3. Customer experience design</li> </ol>         | <ol style="list-style-type: none"> <li>4. Customer profiling</li> <li>5. Customer relationship management</li> <li>6. Customer screening and onboarding</li> </ol> |
| Digital and Data Integration                          | <ol style="list-style-type: none"> <li>7. Marketing</li> <li>8. Pricing strategy</li> <li>9. Product advisory</li> </ol>   | <ol style="list-style-type: none"> <li>10. Sales target management</li> <li>11. Underwriting management</li> </ol>   |
| Financial Products and Services                       | <ol style="list-style-type: none"> <li>12. Marketing</li> <li>13. Pricing strategy</li> <li>14. Product advisory</li> </ol>  | <ol style="list-style-type: none"> <li>15. Sales target management</li> <li>16. Underwriting management</li> </ol>   |
| Growth and Partnerships                               | <ol style="list-style-type: none"> <li>17. Business opportunities development</li> <li>18. Business planning and needs analysis</li> </ol>                                       | <ol style="list-style-type: none"> <li>19. Disruption management</li> <li>20. Global perspectives</li> <li>21. Market profiling</li> </ol>                         |
| Investment & Financial Management                     | <ol style="list-style-type: none"> <li>22. Insurance claims processing</li> <li>23. Internal control</li> </ol>  |  |
| Procurement Management                                | <ol style="list-style-type: none"> <li>24. Category management</li> </ol>  |  |
| Risk Management, Governance and Regulatory Compliance | <ol style="list-style-type: none"> <li>25. Anti-Money laundering</li> <li>26. Artificial intelligence, ethics, and system governance</li> <li>27. Internal governance</li> </ol> | <ol style="list-style-type: none"> <li>28. Regulatory compliance</li> <li>29. Risk governance</li> <li>30. Sustainability risk management</li> </ol>               |
| Sustainable Finance and Insurance                     | <ol style="list-style-type: none"> <li>31. Non financial industry sustainability development</li> </ol>  | <ol style="list-style-type: none"> <li>32. Sustainable insurance and reinsurance solutions and applications</li> </ol>   |

### Power Skills

|                       |  |   |
|-----------------------|--|---|
| Innovation & Delivery | <ol style="list-style-type: none"> <li>1. Adaptability and resiliency</li> <li>2. Business acumen</li> <li>3. Digital fluency</li> </ol> | <ol style="list-style-type: none"> <li>4. Innovative thinking</li> <li>5. Learning agility</li> </ol> |
| Social Intelligence   | <ol style="list-style-type: none"> <li>6. Communication</li> <li>7. Empathy</li> </ol>   |   |



# REGISTER NOW



**Asian Institute of Insurance**

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