Asian Institute of Insurance

BASIC AGENCY MANAGEMENT COURSE
TRAIN-THE-TRAINER (BAMC TTT) REFRESHER

DATE:
30 April 2026

LEARNING DELIVERY:
Class-Based (Face to Face)

LEARNING DURATION:
7 Hours

PROFICIENCY LEVEL:
Intermediate

FSF
FUTURE SKILLS FRAMEWORK
MALAYSIA

15 Prime Skills
15 Power Skills

REGISTERED HRD CORP TRAINING PROVIDER

HRD CORP CLAIMABLE · HRDCORP CLAIMABLE · HRDCORP CLAIMABLE

Training Programme No:
1000166O136

COURSE OVERVIEW

Train the Trainer for Basic Agency Management Course (BAMC-TTT) is a dedicated programme aimed at preparing trainers to be proficient with the Basic Agency Management Course (BAMC) within the life insurance industry. It focuses on developing participants' training skills, familiarising them with the BAMC curriculum, and teaching methodologies specifically tailored for agency management in life insurance.

Through this programme, individuals gain expertise in adult learning principles, presentation techniques, instructional strategies, and assessment methods necessary to effectively deliver the BAMC content. Gear towards experienced insurance professionals or individuals with agency management expertise, the BAMC-TTT aims to groom competent trainers capable of guiding and educating future unit managers within the insurance sector.

LEARNING OUTCOMES

Module 1: Preamble & Introduction to Agency Management
- Articulate foundational agency management concepts and the AQB philosophy.
- Analyse the agent-to-leader transition.
- Identify competencies and structures supporting leadership success.

Module 2: Leadership and Planning
- Analyse leadership effectiveness.
- Evaluate agency culture.
- Apply strategic planning, goal setting, and action planning to drive agency performance.

Module 3: Recruitment
- Design recruitment strategies tailored to diverse candidate pools.
- Develop agent profiles.
- Apply ethical, effective recruitment techniques to support agency growth.

Module 4: Selection
- Executive a multi-step selection process.
- Apply assessment tools and ethical decision-making.
- Evaluate candidate alignment with agency work, goals and culture.

Module 5: Training And Coaching
- Apply adult learning principles and coaching model.
- Design effective training programs.
- Foster continuous development through structured processes.

Module 6: Performance Management and Supervision
- Develop and apply performance management systems.
- Supervise agents effectively.
- Use assessment tools to support agent growth and accountability.

Module 7: Agent and Business Retention
- Analyse retention factors.
- Implement strategies to retain agents and clients.
- Promote regulatory compliance and professional satisfaction.

Module 8: Agency Building Roadmap
- Create a strategic agency development plan.
- Integrate motivation, systems, and digital tools.
- Support agents through adaptable and growth-oriented leadership.

PROGRAMME CONTENT

Module 1: Preamble and Introduction to Agency Management	**Preamble (Part A)** 1. BAMC Course Requirements 2. BAMC Course Contents 3. Basic Principles of Life/Takaful/Financial Services Agency Management 4. Change of Role: Agent to Agency Leader 5. Building Quality Business Quality Agency – AQB philosophy and mindset **Introduction to Agency Management (Part B)** 1. New development and Transformation of the Financial Industry 2. Agency Management 3. Benefits and Challenges of Being An Agency Leader 4. Tasks of An Agency Leader vs An Agent 5. Required Competencies of An Agency Leader 6. Support Structure for An Agency Leader 7. Summary of An Agency Leader's Duties
Module 2: Leadership and Planning	1. Good Leadership 2. Agent's Expectation 3. Agency Culture 4. Agency Culture and Performance 5. What Influences Agency Culture 6. Planning 7. Goal Setting 8. Action Planning 9. Agency Philosophy
Module 3: Recruitment	1. Definition of Recruitment 2. Recruiting Philosophy 3. Why Recruit? 4. The Importance of Recruiting 5. The Recruiting Process 6. Recruiting Objectives 7. Developing Agents Profile 8. Facts of Recruiting and Selection Activities 9. Major Sources of Candidates 10. Candidate Guideline 11. People Interested in This Industry 12. Recruiting Through Personal Activity 13. Getting Help From Nominators 14. Recruiting Trends Today 15. Different Generations and Social Media Recruitment

PROGRAMME CONTENT

Module 4:
Selection
	1. Definition of Selection
	2. The Importance of Selection
	3. The Principles of Selection
	4. The Selection Process
	5. The Selection Process Elaborated
	   Step 1 – Initial Interview and Selection Screening
	   Step 2 – Fact Finding Interview
	   Step 3 – Additional Information
	   Step 4 – Final Evaluation and Decision Making
	   Step 5 – The Career Presentation
	   Step 6 – Pre-Contract Orientation Program
	   Step 7 – Early Individualised Training
	6. Online Selection Tools in The Market

Module 5: Training and Coaching	1. Definition of Training 2. The KASH Formula 3. The Principles of Adult Learning 4. Barriers to Learning 5. Preparing to Train 6. The PESOS Training Process 7. Coaching for Performance (GROW Model) 8. Continuous Professional Development 9. Life Insurance Industry Training and Development
Module 6: Performance Management and Supervision	1. What is Performance Management? 2. Definition of Supervision 3. Why Performance Management and Supervision? 4. Why Agents Fail? 5. Good Performance Management and Supervision 6. Methods of Good Performance Management and Supervision 7. Managing Through BALANCED SCORE CARD
Module 7: Agent and Business Retention	1. The Need for New Agent Retention 2. The Benefits of Retention 3. Factors Affecting Retention 4. Business Retention (Persistency) 5. Adhering to Industry Regulatory Framework
Module 8: Agency Building Roadmap	1. The Future 2. Helping New and Established Agents 3. Motivation Factors for New Agents 4. Problems of Established Agents 5. Who Do New Leaders Turn To For Help? 6. Systems That Work 7. Run Agency Meeting 8. Digitization of Work Process and Workplace 9. Your Agency Plan

PRE-REQUISITE FOR PARTICIPANTS

- Possess tertiary education or recognized professional education.
- Employed as a Life Company Trainer for at least two years and has undergone company's trainer programme.
- Has undergone the Aii's BAMC Course or passed the BAMC Examination.
- Has undergone the BAMC Train the Trainer (TTT) programme prior.
- Willing to work for the betterment of the Aii-BAMC and the accomplishment of its objectives.
- Committed to the whole programme.
- Willing to follow Aii-BAMC Ground rules and procedures.
- Able to relate the text material to their students' works.
- Able to conduct and deliver the programme effectively.
- Proficient in the language in which the trainer will be conducting the Aii-BAMC.

COURSE DETAILS

Learning Delivery:
Class-Based (Face to Face)

Medium of Training:
English

Registration:
https://aii4u.org/ilms/user/login

Fees:
RM500 per pax

Programme Schedule	Closing Date
30 April 2026 (9.00 am – 5.00 pm)	16 April 2026

WHO SHOULD ATTEND

- Individuals pursuing a career as a BAMC trainer
- Aspiring trainers

TRAINER PROFILE

Sani Ayob
HRD Corp Certified Trainer, Master Trainer by Fortis Financial Services Academy (HK), Chartered Financial Consultant (ChFC), Chartered Life Underwriter (CLU), Shariah Registered Financial Planner (Shariah RFP), Life Underwriter Training Council Fellow (LUTCF), Agency Management Training Course (AMTC), Basic Agency Management Course (BAMC)

Obtained a Certificate in Shariah from UIA in 2017, an MBA from UPM in 2007, and a Diploma in Business Studies from UITM in 1982.

He gained experience working in Hong Kong as the Head of Wealth Management (Insurance & Financial Planning) Learning & Development of Asia Pacific HSBC (HK}, responsible for the Bancassurance Development for the Asia Pacific Region. He trained and coached Financial Planning Managers across the APAC region in Hong Kong, Singapore, Indonesia and India.

During his 5 years stint in Hong Kong, he successfully achieved 'HK Best Practice Award' on Bancassurance Training Curriculum and ASTD Award (USA) on the Asia Pacific Bancassurance Curriculum under the People Development Category Award.

To date, he has successfully directed major projects amongst others are the Incubator programme with established local universities, Sales Leadership Coaching and MDRT sales series programme for Family Takaful sales force with objective to develop, nurture, enhance and upskill the quality of their sales results.

ALIGNMENT TO THE FUTURE SKILLS FRAMEWORK

FSF
FUTURE SKILLS FRAMEWORK
MALAYSIA

15 Prime Skills
15 Power Skills
Proficiency Level: Intermediate

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
Digital and Data Integration	6. Data Collection and Analytics	
Financial Products and Services	7. Marketing 8. Product Advisory 9. Quality Assurance	10. Sales Strategy 11. Sales Target Management
Growth and Partnerships	12. Business Opportunities Development 13. Business Performance Management	14. Business Planning and Needs Analysis 15. Partnership Management

Power Skills

Innovation and Delivery	1. Adaptability and Resiliency 2. Business Acumen 3. Change Management 4. Critical Thinking 5. Digital Fluency	6. Innovative Thinking 7. Learning Agility 8. Problem-Solving 9. Sustainability Awareness
Social Intelligence	10. Coaching and Mentoring 11. Collaboration 12. Communication	13. Conflict Management 14. Empathy 15. Influencing and Negotiating

AGENCY MANAGEMENT

Asian Institute of Insurance (Aii) courses have been granted the status of Approved Training Programme (ATP) under the Human Resources Development Act 1992. Based on Training Providers Circular No. 3/2021, PSMB has imposed a requirement that training providers need to register their training programme under the HRD Corp Claimable Course Scheme to offer training to the employers who are registered under the Human Resource Development Corporation (HRD Corp).

1.   What is HRD Corp Claimable Courses?
HRD Corp Claimable Courses formerly known as SBL Khas is a scheme to assist registered employers, especially those with limited resources to train and upskill their employees in line with their operational and business requirements. Under this scheme, HRD Corp will pay the course fee (subjected to 4% service fee from 1st April 2021) directly to the training providers by deducting the amount from the employers' levy account. HRD Corp will also pay other claimable allowances to the employer.

2.   How are Training Providers or Employers to submit for HRD Corp Claimable Courses?
Asian Institute of Insurance (Aii) will submit their Courses registration via the HRDC e-Tris system. Once course is approved as Claimable Course (previously known as SBL Khas course), the approved course will appear in the HRDC e-Tris system.

Employers will need to access the e-Tris system to select the course and submit to HRDC for grant approval. The total claimable amount is subject to the approval of each Employer individual grant application, Once HRDC approves Employer grant, the company must provide the approved grant code to Asian Institute of Insurance (Aii).

After the training is conducted, Employers are required to complete HRDC Attendance Reports eg. JD14 and submit necessary documents to ensure HRDC settlement of Asian Institute of Insurance (Aii) invoice.

Asian Institute of Insurance (Aii) will submit the invoice directly to HRDC with the approved grant code for each participant or Employer.

3.   How to submit the grant application?
Please click on link for information on training grants application: https://hrdcorp.gov.my/employer-guidelines/

4.   What are the supporting documents required?
Please click on link for information on training grants application:
https://hrdcorp.gov.my/wp-content/uploads/2022/07/HRD-Corp_SBL_Grant-Helper.pdf

Important Notice:
- Effective 1st August 2019, training programmes must commence within six (6) months from the date of training grant applications are made and training claim submissions must be made not more than six (6) months from the date the training programmes are completed.
- Application must be submitted by employers before training date commencement.
- The company shall bear full responsibility for the programme fee balance if the HRDC claim is not approved or claimable for any reason.

For more information and updates on HRDC, please refer to its official webpage at www.hrdcorp.gov.my. Should you have any problem in accessing your e-Tris account, kindly forward the issue to HRDC IT Help Desk at ithelpdesk@hrdcorp.gov.my

Application Process:

01 Application via e-TRis

Documents Required:
- Quotation / Invoice
- Training Schedule / Course Content
- Trainer Profile

02 Approval

Documents Required:
- To share Grant ID to Training Provider

01 Claim

Documents Required:
- Itinerary (airfare) - if any
- Receipt & Invoice (transportation) - if any

REGISTER NOW

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