Consultative Selling for Insurance Professionals Training Course

Professional Development Training Course Outline

Category	Insurance	**Duration**	10 Days
Base Fee	$3,000 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

In today's competitive insurance marketplace, consultative selling has become a critical skill for insurance professionals who aim to create lasting client relationships and close more sales with integrity. Training Course on Consultative Selling for Insurance Professionals is designed to empower agents, brokers, and advisors with advanced techniques that go beyond transactional selling. Through a customer-centric approach, participants will learn to uncover client needs, build trust, and present value-based insurance solutions using industry-proven frameworks.

This course integrates modern sales psychology, digital client engagement strategies, and real-world case studies to foster a powerful transformation in sales performance. Whether you're selling life, health, property, or casualty insurance, this program enables professionals to align their offerings with the evolving needs of today's informed clients. Expect a blend of high-impact training, live discussions, hands-on exercises, and tools that accelerate success and elevate client satisfaction.

Programme Curriculum

Consultative Selling for Insurance Professionals Training Course

Introduction

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Course Objectives

1. Understand the principles of consultative selling in the insurance industry.
2. Develop effective client communication strategies using emotional intelligence.
3. Master needs-based selling and risk profiling techniques.
4. Apply active listening and questioning techniques to uncover client priorities.
5. Learn to build trust and long-term client relationships.
6. Gain confidence in handling objections and client hesitations.
7. Use value proposition strategies tailored for different insurance products.
8. Identify cross-selling and up-selling opportunities ethically.
9. Implement digital tools for client engagement and virtual sales meetings.
10. Analyze customer profiles through data-driven decision-making.
11. Craft compelling insurance presentations and proposals.
12. Navigate compliance and ethical sales practices in insurance.
13. Leverage CRM systems and automation for consultative follow-up.

Target Audiences

1. Insurance agents and brokers
2. Life insurance professionals
3. Property and casualty advisors
4. Health insurance consultants
5. Insurance customer service reps transitioning into sales
6. Insurance team leads and sales managers
7. Financial advisors offering insurance products
8. Insurance marketing professionals seeking sales insights

Course Duration: 10 days

Course Modules

Module 1: Introduction to Consultative Selling

- Define consultative selling in the insurance sector
- Distinguish between transactional vs consultative approaches
- Understand the psychology of modern buyers
- Explore the buyer’s journey
- Identify your personal selling style
- **Case Study: Transitioning from Hard Sell to Heart Sell**

Module 2: Understanding Client Needs

- Conduct in-depth needs assessments
- Utilize open-ended questioning techniques
- Perform risk profiling for individuals and businesses
- Leverage pre-call research strategies
- Document client objectives for customization
- **Case Study: Profiling a Small Business Owner’s Insurance Needs**

Module 3: Active Listening and Empathy

- Apply empathetic listening in sales conversations

- Recognize verbal and non-verbal cues
- Use reflective questioning to validate client input
- Build rapport authentically
- Avoid assumptions and sales pressure
- **Case Study: Listening Your Way to a Six-Figure Sale**

Module 4: Building Trust and Credibility

- Develop personal credibility with prospects
- Share stories/testimonials strategically
- Display transparency with product limitations
- Offer education over persuasion
- Stay consistent in communication
- **Case Study: From Cold Prospect to Lifelong Client**

Module 5: Tailoring Value Propositions

- Map client needs to product benefits
- Position yourself as a solution provider
- Customize product offerings
- Communicate value over price
- Present using clear, jargon-free language
- **Case Study: Winning High Net-Worth Clients with Value Focus**

Module 6: Handling Objections Confidently

- Identify the root cause of objections
- Use objection-handling frameworks (LAER, Feel-Felt-Found)
- Stay calm and confident
- Address price and coverage concerns
- Turn objections into opportunities
- **Case Study: Converting Objections into Trust**

Module 7: Closing the Consultative Sale

- Recognize verbal buying signals
- Use assumptive and alternative closes
- Ask for commitment with confidence
- Reinforce value before the close
- Schedule follow-ups strategically
- **Case Study: Sealing the Deal with Strategic Timing**

Module 8: Cross-Selling and Upselling Techniques

- Identify complementary insurance products
- Use client lifestyle data to suggest relevant upgrades
- Apply bundling strategies ethically
- Educate clients on holistic coverage
- Avoid over-selling and ensure alignment
- **Case Study: Increasing Revenue with Smart Cross-Selling**

Module 9: Digital Engagement Strategies

- Leverage social media for lead generation
- Use video conferencing effectively
- Create compelling email outreach

- Implement chatbots and virtual assistants
- Build a digital trust presence
- **Case Study: Virtual Sales Success in the Remote Era**

Module 10: CRM and Sales Automation

- Understand the role of CRMs in consultative sales
- Track client interactions and follow-ups
- Automate tasks without losing personalization
- Use data for targeted outreach
- Set up sales pipelines efficiently
- **Case Study: Boosting Productivity with CRM**

Module 11: Proposal and Presentation Techniques

- Create client-specific proposals
- Use storytelling to sell insurance
- Design visual presentations
- Avoid technical jargon
- Highlight outcomes over features
- **Case Study: The Power of a Well-Timed Proposal**

Module 12: Sales Ethics and Compliance

- Understand industry regulations
- Recognize unethical sales practices
- Prioritize client welfare
- Document sales conversations accurately
- Stay informed on compliance updates
- **Case Study: Avoiding a Regulatory Audit**

Module 13: Time and Pipeline Management

- Prioritize leads using qualification frameworks
- Allocate time for follow-ups
- Set and track personal KPIs
- Segment your pipeline
- Stay organized with scheduling tools
- **Case Study: Time Mastery for a Top Performer**

Module 14: Post-Sale Client Retention

- Schedule policy reviews
- Offer ongoing risk assessments
- Send timely renewal reminders
- Upsell through education
- Ask for referrals tactfully
- **Case Study: Turning Clients into Advocates**

Module 15: Personal Sales Development Plan

- Set measurable goals
- Identify learning gaps
- Create an action plan
- Practice with peer coaching
- Measure progress with feedback tools

- **Case Study: From Average to Rockstar in 6 Months**

Training Methodology

- Interactive instructor-led sessions
- Role-playing and live simulations
- Breakout group discussions
- Digital tools and CRM demonstrations
- Real-life insurance case studies for hands-on learning
- Continuous assessment through quizzes and feedback forms

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call *+254769199797*

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
21 Sep 2026	02 Oct 2026	Online	$2,000
21 Sep 2026	02 Oct 2026	Physical	$3,000
21 Sep 2026	02 Oct 2026	Physical	$0
21 Sep 2026	02 Oct 2026	Physical	$0

Start Date	End Date	Location	Price
21 Sep 2026	02 Oct 2026	Physical	$0
21 Sep 2026	02 Oct 2026	Physical	$0
21 Sep 2026	02 Oct 2026	Physical	$0
21 Sep 2026	02 Oct 2026	Physical	$0

Ready to enroll or request a customized program? Book online or contact us:

Register Online Now

Email: info@fineskilltrainingcenter.com | Website: www.fineskilltrainingcenter.com