

The Digital Insurance Agent

Building Digitally Capable Insurance Agents for Modern Distribution



Online Programme

Programme Overview

The insurance industry is undergoing rapid digital transformation, requiring agents to adopt new tools, engage customers through digital channels, and deliver faster, more responsive service.

The Digital Insurance Agent programme is designed to support insurers and financial institutions in building a digitally capable salesforce equipped to operate effectively in today's technology-driven insurance environment.

The programme focuses on practical skills that agents can apply immediately, including digital prospecting, customer engagement, virtual selling, CRM utilisation, and digital policy servicing.

Learners develop the capability to confidently operate in a digital insurance environment while delivering professional, customer-centered service.

Ideal for insurance professionals seeking to build digital skills and grow their careers in a rapidly evolving industry.

What Participants Will Be Able to Do

By the end of the programme, participants will be able to:

- Prospect and generate leads using digital platforms
- Engage and communicate effectively with clients through mobile and online channels
- Present insurance solutions and close sales digitally
- Manage customer relationships using CRM systems
- Support digital payments, servicing, and claims processes
- Apply ethical standards and compliance in digital insurance practice
- Adapt to emerging trends in digital insurance distribution

Why This Programme Matters for Insurers

- Improves agency productivity and sales performance
- Strengthens digital sales and customer engagement capability
- Supports organisational digital transformation initiatives
- Enables scalable training across large distribution teams
- Enhances professionalism and compliance standards

Programme Structure

The programme is delivered through a structured set of practical modules covering the full digital insurance distribution journey:

- The role of the modern digital insurance agent
- Digital tools and platforms for agents
- Social media and digital marketing
- Understanding the digital insurance customer
- Digital sales, prospecting, and lead management
- Recruiting and developing digital advisors
- Leading digital sales teams
- Training through digital media
- Compliance, data protection, and ethics
- Digital payments, policy servicing, and claims support
- The future of digital insurance distribution

Who Should Attend

- Insurance Agents and Brokers
- Bancassurance Officers and Relationship Managers
- Corporate Sales Representatives
- Unit and Agency Managers
- Agency Development and Training Officers
- New entrants seeking professional certification in digital insurance

Key Programme Features

- 100% online and self-paced learning
- Designed for working professionals
- Practical, real-world insurance applications
- African market relevance
- Immediate workplace application
- Scalable for corporate and institutional training

Programme Delivery

- Mode: Fully Online
- Duration: 6–8 weeks (self-paced)
- Access: 24/7 via IIEA Learning Platform

Assessment & Certification

Participants who successfully complete the programme requirements will receive:

Certificate of Achievement - The Digital Insurance Agent

Issued by the Insurance Institute of East Africa (IIEA)

Assessment is conducted through an online multiple-choice examination.

Corporate Training Opportunity

This programme can be deployed across:

- Agency forces
- Bancassurance teams
- Broker networks
- Distribution partners

as a structured digital capability initiative to strengthen sales performance and customer engagement.

Enrolment & Corporate Bookings

To enrol or discuss corporate training opportunities:

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