Contents

Next Innings – Financial Well-being & Purposeful Living 2

Next Innings – A 1-Day Transformational Workshop 4

Negotiation Skills Workshop 6

Time Management Workshop 8

Root Cause Analysis (RCA) Workshop 10

Sales Mentorship Program 12

Financial Wellness for Women – Smart Money Moves for a Secure Future 15

Certified Insurance Planner Master the Art of Insurance Planning 18

Next Innings – Financial Well-being & Purposeful Living

Program Objective

This transformational program is designed for working professionals seeking to align financial planning with personal growth and life purpose. Based on the book *NextInnings.Life*, the program equips participants to navigate life transitions, rediscover passions, and build a fulfilling life — both now and in the future — while managing their career and responsibilities effectively.

Target Audience

- Mid-career professionals
- Individuals approaching or planning life transitions (career change, retirement, second innings)
- Employees looking to achieve work-life balance and long-term financial security

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Key Components & Session Themes

1. **Welcome & Introduction**
   Setting the tone for a life of financial well-being and purposeful living.
2. **The Art of Transition**
   Managing change with financial readiness and emotional resilience.
3. **Rediscovering Passions & Setting Financial Goals**
   Aligning life goals with financial priorities for a meaningful future.
4. **Financial Well-Being for a Purposeful Life**
   Tools for financial health checks and building a secure foundation.
5. **Insurance & Retirement Planning**
   Ensuring future freedom with proper coverage and corpus planning.
6. **Family, Relationships & Financial Independence**
   Creating harmony between money matters and meaningful relationships.

7. **Health & Wealth**
   Planning for well-being beyond financial wealth.
8. **Entrepreneurship & Volunteering**
   Exploring income and impact-driven ventures confidently.
9. **Legacy & Celebrating Life**
   Estate planning and embracing happiness in the present.
10. **Wrap-Up & Action Plan**
    Recap, Q&A, and participant action commitments for continued growth.

Delivery Method

- **Live Online Workshops / In-Person Sessions** (customizable as per corporate needs)
- Interactive presentations, real-life case discussions, and participant reflection exercises

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Timeline / Schedule

- Customizable for full-day formats
- Includes final action plan and follow-up engagement options

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Outcome for Participants

- Clarity in personal and financial life goals
- Better work-life balance
- Enhanced decision-making for long-term well-being
- Confidence to embrace life transitions with preparedness

Next Innings – A 1-Day Transformational Workshop

Redefining Milestones for a Balanced and Fulfilling Life with Experiential-Based Learning

Program Objective

This inspiring program helps participants pause, reflect, and take charge of their lives by identifying imbalances and applying practical strategies for **financial clarity**, **personal growth**, **stress management**, and **work-life harmony**. Drawing from the book *NextInnings.Life*, the program empowers individuals to align their present actions with future aspirations for a meaningful and joyful life.

Target Audience

- Working professionals seeking better balance and direction
- Individuals navigating transitions or burnout
- Mid-career employees aiming for personal growth and financial planning

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Key Components & Session Themes

1. **Welcome & Introduction**
   Setting the tone and creating a safe, engaging space for reflection and discovery.
2. **Embracing Change – The Power of Transitions**
   Icebreakers, psychology of change, storytelling, and life-mapping exercises.
3. **Passion, Purpose & Personal Growth**
   Rediscovering lost interests, fitting passions into modern life, and goal alignment.
4. **Financial Clarity & Future Planning**
   Breaking financial myths, budgeting for joy and security, and building financial tools.
5. **Work-Life Balance & Stress Management**
   Time analysis, stress role-plays, boundary-setting, and a personal change pledge.
6. **Closing & Action Plan**
   Final reflections, 30-day challenge, peer learning, and practical application.

Delivery Method

- **Interactive Workshop Format** (In-person or Live Virtual)
- Includes storytelling, group discussions, guided reflection, and practical tools
- Exercises, templates, and action plans for immediate implementation

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Timeline / Schedule

- Customized as a 1-day intensive
- Includes pre-workshop questionnaire and post-workshop 30-day action challenge

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Outcomes for Participants

- Renewed purpose and motivation
- Personalized action plan for a better work-life balance
- Clear financial direction aligned with life goals
- Practical stress and time management techniques

Negotiation Skills Workshop

Mastering Negotiation for Win-Win Outcomes and Lasting Business Relationships

Program Objective

To equip professionals with practical and advanced negotiation strategies that lead to mutually beneficial agreements, improved communication, and stronger long-term business relationships. This workshop aims to enhance decision-making and performance in various negotiation settings.

Target Audience

- Middle and senior management professionals
- Team leads, sales, procurement, and client-facing roles
- Cross-functional managers involved in decision-making or vendor/customer negotiations

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Key Components / Topics Covered

- Understanding negotiation dynamics and human behavior
- Structured preparation techniques for effective negotiations
- Persuasion, influence, and communication skills
- Conflict resolution and collaborative compromise
- Building sustainable relationships beyond the negotiation table

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Delivery Method

- **Interactive Instructor-Led Workshop** (In-person or Virtual)
- Includes role-play simulations, real-life case studies, and group discussions
- Highly experiential with peer feedback and live practice

Timeline / Schedule

- **Duration**: 1 Day (8 Training Hours)
- **Ideal Group Size**: 15–25 participants

Expected Outcomes

- Improved negotiation outcomes in daily operations
- Higher confidence in managing complex discussions
- Strengthened relationships with clients, vendors, and internal teams
- Reduced conflicts and faster decision-making cycles

Time Management Workshop

Boosting Personal Productivity and Performance Through Smart Time Use

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Program Objective

To empower participants with effective time management tools and strategies that help prioritize tasks, reduce distractions, and optimize productivity. This workshop fosters intentional time use for achieving professional goals while maintaining personal well-being.

Target Audience

- Entry-level to middle management professionals
- Team leads, project coordinators, and individual contributors
- Anyone struggling with workload, deadlines, or personal productivity

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Key Components / Topics Covered

- Core principles and myths of time management
- SMART goal setting for better focus and outcomes
- The Eisenhower Matrix for task prioritization
- Handling interruptions, distractions, and procrastination
- Using digital tools and techniques for effective planning
- Creating personalized action plans for long-term change

Delivery Method

- **Interactive Workshop Format** (In-person or Virtual)
- Includes group activities, time-use analysis, tool demonstrations, and real-life scenarios
- Outcome-driven with personalized planning and reflection exercises

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Timeline / Schedule

- **Duration**: 1 Day (8 Training Hours)
- **Ideal Group Size**: 15–25 participants

Expected Outcomes

- Enhanced daily productivity and focus
- Ability to prioritize tasks effectively
- Reduced stress and improved time-bound execution
- Clear strategies for balancing urgent and important responsibilities

Root Cause Analysis (RCA) Workshop

Solving Problems Effectively by Identifying and Eliminating Root Causes

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Program Objective

To train participants in systematically identifying the true causes of recurring problems and implementing effective, long-term solutions. This workshop enables teams to move beyond surface-level fixes and develop a problem-solving culture for continuous improvement.

Target Audience

- Middle and senior-level managers
- Quality assurance and operations professionals
- Project leads, team leaders, and process improvement teams

Key Components / Topics Covered

- Introduction to Root Cause Analysis and its business relevance
- Practical tools: Fishbone Diagram, 5 Whys, Pareto Analysis
- Collecting and analyzing relevant data
- Designing and implementing corrective actions
- Monitoring success and measuring effectiveness of solutions

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Delivery Method

- **Hands-On Workshop** (In-person or Virtual)
- Includes real-life case studies, tool-based exercises, and group problem-solving
- Focused on application-based learning with actionable takeaways

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Timeline / Schedule

- **Duration**: 1 Day (8 Training Hours)
- **Ideal Group Size**: 15–20 participants

Expected Outcomes

- Improved analytical and problem-solving capabilities
- Reduction in recurring issues and operational inefficiencies
- Enhanced decision-making with a structured approach
- Stronger culture of accountability and continuous improvement

Sales Mentorship Program

52-Week Exclusive Program for Insurance Advisors – Your Path to Continuous Growth

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Program Objective

To transform Insurance Advisors into confident, high-performing professionals by providing continuous sales mentorship over 52 weeks. The program enhances prospecting, engagement, presentation, closing, and relationship-building skills through structured learning, real-world application, and expert support.

Target Audience

- Life, general, and health insurance advisors
- New and mid-level advisors aiming to boost sales consistency
- High-potential agents preparing for leadership roles

Key Components

Core Learning Modules

1. **Mastering Prospecting**
   - Identify high-value prospects
   - Build qualified lead lists using digital tools
2. **Securing Appointments**
   - Create persuasive scripts
   - Handle objections to confirm meetings
3. **Creating First Impressions**
   - Build trust and analyze client needs
   - Present yourself professionally
4. **Strategic Preparation**
   - Research clients

    - Deliver personalized, compelling pitches

5. **Effective Presentation & Closing**
    - Communicate value clearly
    - Apply proven closing and objection-handling techniques
6. **Referrals, Upselling & Cross-Selling**
    - Leverage satisfied clients for referrals
    - Deepen relationships to maximize sales

Delivery Method

- **Initial Diagnostic**: Sales skills assessment and goal setting
- **Workshops**: Interactive, roleplay-based skill-building modules
- **Field Assignments**: Weekly real-world application with feedback
- **Peer Learning**: Group sharing and networking
- **Expert Support**: Weekly mentorship calls for troubleshooting challenges

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Timeline / Schedule

- **Duration**: 52 Weeks
- **Format**:
    - Monthly skill-building workshops
    - Weekly handholding/mentorship sessions
    - Continuous goal tracking and adaptive coaching

Expected Outcomes

- Improved sales performance and closing ratios
- Increased client retention and referral generation
- Sustained confidence and motivation through mentorship

- Real-time problem-solving and personalized development

Why This Program Works

This unique 52-week structure ensures continuous learning, consistent feedback, and hands-on practice — the pillars of long-term success in the competitive insurance industry.

Financial Wellness for Women – Smart Money Moves for a Secure Future

Program Overview

This interactive and empowering workshop is designed to help women take control of their financial lives with clarity, confidence, and smart decision-making. Covering everything from budgeting and saving to investing, debt management, and financial protection, this session equips participants with the knowledge and tools to make informed money choices and secure their financial future.

The program fosters a shift in mindset, enabling women to understand the importance of financial independence and equipping them to set clear goals, manage risks, avoid financial pitfalls, and build long-term wealth. Participants leave with a personal action plan and practical takeaways they can implement immediately.

Target Audience

- Working women across all income levels and career stages
- Homemakers planning to take charge of household finances
- Young professionals and early-stage investors
- Women preparing for key life transitions (marriage, children, retirement)

Key Components

1. Financial Mindset & Awareness
Participants learn the value of financial independence and how to build a confident, growth-oriented mindset around money.

2. Goal Setting & Retirement Planning
Through activities and tools like the SMART framework, attendees identify their financial goals and understand how to build a retirement plan considering inflation and life milestones.

3. Budgeting & Saving Techniques
Hands-on budgeting activities introduce practical rules (like the 50/30/20 rule), with strategies to increase savings without sacrificing quality of life.

4. Debt Management & Credit Score
Participants gain clarity on good vs. bad debt, how credit scores impact financial well-being, and how to use credit wisely.

5. Investing for Women
The session demystifies investment products such as mutual funds, SIPs, and retirement funds, emphasizing the need for women to invest early and regularly.

6. Insurance & Risk Management
Understanding the importance of health, life, and accident insurance, participants learn how to choose policies that align with their life stage and financial goals.

7. Advisor Selection & Scam Awareness
Women are trained on evaluating financial advisors, identifying red flags in financial schemes, and safeguarding against fraud.

8. Financial Tools & Apps
Introduces apps that simplify budgeting, automate savings, and monitor investment performance.

9. Wrap-Up & Action Plan
The session concludes with a live Q&A, a financial wellness checklist, and a personalized action plan for immediate implementation.

Delivery Method

- **Live Interactive Workshop** (In-person or Virtual)
- Includes guided activities, personal reflection exercises, group interaction, and live demonstrations
- Customizable for corporates, women's groups, or open public sessions

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Timeline / Schedule

- **Duration**: 2.5 to 3 hours (flexible as per group requirement)
- Structured into 9 engaging modules with real-life examples and exercises

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Expected Outcomes

- Greater financial confidence and awareness
- Clear, actionable budgeting and saving strategy
- Preparedness for life goals, emergencies, and retirement
- Ability to avoid scams and manage money independently
- Personalized checklist and daily practices for long-term wellness

Certified Insurance Planner
Master the Art of Insurance Planning

11-Month Weekend Academic Program | Practical Learning with Industry Exposure

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Program Objective

The Certified Insurance Planner Program is a comprehensive, 11-month weekend course designed to equip aspiring professionals with deep knowledge and practical skills in insurance planning, sales psychology, risk management, underwriting, claims, and client servicing. It combines theoretical learning with hands-on application, empowering participants to build a successful and ethical career in the evolving insurance sector.

Target Audience

- **Students & Graduates** seeking a strong foundation in insurance and financial services
- **Aspiring Insurance Professionals** aiming to enter or grow within the insurance industry
- **Financial Advisors & Sales Executives** who want to sharpen their insurance planning and client handling skills
- **Entrepreneurs & Business Owners** looking to explore insurance as a business avenue

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Key Program Coverage

- **Core Concepts**: Insurance fundamentals, industry trends, product categories
- **Planning & Operations**: Risk management, underwriting, claims, taxation
- **Sales Mastery**: Sales psychology, lead generation, objection handling, CRM
- **Soft Skills**: Communication, negotiation, persuasion, client relationship building
- **Emerging Trends**: Digital insurance, InsurTech, AI applications
- **Practical Exposure**: Case studies, real-world projects, and an industry internship

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Program Format & Delivery

- **Duration**: 11 months
- **Schedule**: 44 weekend sessions (3 hours each)
- **Delivery Method**:
  - Classroom and/or Live Virtual Training
  - Led by industry experts and certified trainers
  - Includes interactive sessions, role plays, case studies, and peer learning

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Timeline / Structure

- **Phase 1**: Foundation & Regulatory Knowledge
- **Phase 2**: Product Mastery & Sales Strategy
- **Phase 3**: Digital Innovation & Practical Implementation
- **Phase 4**: Internship + Final Project & Certification

Expected Outcomes

- In-depth understanding of life, health, general, and corporate insurance
- Advanced sales and advisory skills for insurance planning
- Confidence in client engagement, compliance, and ethical selling
- Industry exposure and career readiness through internship and final project