



Accredited Africa Training Institute for Capacity Development

Unit FO409, Hatfield Plaza · 1122 Burnett St, Hatfield 0028 · Pretoria, Gauteng · South Africa

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COURSE BROCHURE

Beneficiary Enquiries Administration For Corporate Environments Training

Business, Commerce and Management Studies / Public Administration

Unit Standard 116251 · NQF Level 4 · 8 Credits · 5 Days

COURSE OVERVIEW

This course equips participants with the skills to efficiently administer beneficiary enquiries within corporate environments. It focuses on managing enquiries related to beneficiary details, claims, and policy updates, ensuring accurate and timely responses while maintaining compliance with organisational policies and relevant legislation.

Category	Business, Commerce and Management Studies
Subfield	Public Administration
Unit Standard	116251
Accreditation	SAQA Accredited · NQF Level 4 · 8 Credits
Duration	5 days
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS – verifiable online

LEARNING OUTCOMES

- Apply organisational procedures to log, track, and respond to beneficiary enquiries accurately.
- Analyse beneficiary information and identify discrepancies or missing data to ensure completeness.
- Evaluate enquiry resolution processes and recommend improvements to enhance efficiency.
- Implement appropriate communication strategies to address sensitive beneficiary enquiries with empathy.
- Demonstrate compliance with relevant legislation and company policies when processing beneficiary data.
- Design a systematic approach to manage high volumes of beneficiary enquiries effectively.

WHO SHOULD ATTEND

- This course is designed for administrative staff, customer service representatives, and benefits administrators who handle beneficiary enquiries in corporate settings.
- It is also suitable for team leaders and supervisors overseeing beneficiary administration processes.

COURSE OUTLINE

Day 1: Foundations of Beneficiary Enquiries in Corporate Environments

- Overview of the South African social security and corporate benefits landscape.
- Key legislation: Pension Funds Act, Social Assistance Act, and POPIA.
- Stakeholder roles: employers, fund administrators, beneficiaries, and regulators.
- Core concepts: beneficiary, dependant, nominee, and enquiry types.
- Data protection principles and confidentiality requirements.
- Introduction to enquiry lifecycle: receipt, processing, and resolution.

Day 2: Enquiry Handling Processes and Communication Skills

- Enquiry intake channels: phone, email, in-person, and online portals.
- Logging and categorizing enquiries: urgency, type, and priority.
- Communication best practices: tone, clarity, and professionalism.
- Handling difficult conversations and emotional beneficiaries.
- Use of CRM and case management software.
- Documenting enquiries: templates, notes, and audit trails.

Day 3: Researching and Resolving Beneficiary Enquiries

- Types of enquiries: status updates, benefit calculations, nomination changes, and disputes.
- Accessing and interpreting beneficiary data from multiple sources.
- Verification processes: identity, relationship, and supporting documents.
- Escalation procedures for unresolved or complex cases.
- Collaboration with legal, HR, and finance teams.
- Case study: resolving a disputed beneficiary designation.

Day 4: Compliance, Risk Management, and Quality Assurance

- Regulatory compliance: FSCA directives, code of conduct, and reporting obligations.
- Risk assessment: fraud, identity theft, and data breaches.
- Quality assurance: call monitoring, case audits, and feedback loops.
- Complaints handling: process, timelines, and resolution.
- Appeals mechanisms: internal review and external dispute resolution.
- Continuous improvement: root cause analysis and corrective actions.

Day 5: Advanced Applications and Integration into Corporate Operations

- Performance metrics: response time, resolution rate, and customer satisfaction.
- Integration with HR, payroll, and benefit administration systems.
- Technology trends: automation, chatbots, and self-service portals.
- Change management: implementing new processes and training staff.
- Capstone exercise: designing an end-to-end enquiry handling workflow.
- Assessment preparation: portfolio of evidence and simulated tasks.

ASSESSMENT & CERTIFICATION

Delegates are assessed through exercises and a final test. A mark of **50% or above** earns an **AATICD Certificate of Completion**, issued digitally with a unique verification code. This course carries **8 NQF credits** at **NQF Level 4**.

PRICING (PER DELEGATE, EX-VAT)

Delegates	Training Method	Price per Delegate	Total
1	Online	R 23,000.00	R 23,000.00
1	In-House	R 29,900.00	R 29,900.00
1	On-Campus (Pretoria)	R 34,500.00	R 34,500.00

UPCOMING SESSIONS

Start	End	Method	Venue
10 Aug 2026	14 Aug 2026	On-Campus	Durban, South Africa
10 Aug 2026	14 Aug 2026	On-Campus	Abu Dhabi, UAE
10 Aug 2026	14 Aug 2026	On-Campus	Pretoria, South Africa
10 Aug 2026	14 Aug 2026	On-Campus	Dubai, UAE
10 Aug 2026	14 Aug 2026	On-Campus	Cape Town, South Africa
10 Aug 2026	14 Aug 2026	On-Campus	Mauritius
17 Aug 2026	21 Aug 2026	On-Campus	Dubai, UAE
17 Aug 2026	21 Aug 2026	On-Campus	Pretoria, South Africa

Contact us if no suitable date is listed – on-demand sessions can be arranged for groups.

HOW TO GET A QUOTE OR APPLY

1. **Get an instant quotation online:** visit www.aaticd.co.za, open the page for this course (Unit Standard 116251) and click **Get A Quote / Apply**. Select your training method and number of delegates – your quotation is generated immediately and emailed to you with the course brochure attached.
2. **Apply by email:** send the course title, your preferred training method (Online, In-House or On-Campus Pretoria), the number of delegates and your preferred dates to apply@aaticd.co.za – our team will reply with a formal quotation.
3. **Apply by phone or WhatsApp:** call **+27 12 004 8389** or WhatsApp **+27 65 077 6310** and we will prepare your quotation and reserve your seats.
4. **Confirm your booking:** accept the quotation and settle the invoice. As soon as payment is confirmed your delegates are enrolled and receive their AATICD LMS login details by email, along with joining instructions for their chosen training method.

Group discounts apply automatically – the more delegates you enrol, the lower the price per delegate. No payment is required to request a quotation.

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