



Accredited Africa Training Institute for Capacity Development

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

Tel: +27 12 004 8389 · Mobile: +27 65 077 6310

Email: apply@aatikd.co.za · Website: www.aatikd.co.za

COURSE BROCHURE

Intermediary and Market Relationship Management in Insurance

Business, Commerce and Management Studies / Finance, Economics and Accounting

Unit Standard 243160 · NQF Level 5 · 3 Credits · 1 Day

COURSE OVERVIEW

This course equips learners with the skills needed to effectively manage relationships between intermediaries and the market within commercial or corporate insurance environments. Participants will learn to navigate the complexities of intermediary dynamics, foster trust, and align market strategies to achieve organisational objectives.

Category	Business, Commerce and Management Studies
Subfield	Finance, Economics and Accounting
Unit Standard	243160
Accreditation	SAQA Accredited · NQF Level 5 · 3 Credits
Duration	1 day
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS – verifiable online

LEARNING OUTCOMES

- Analyse the roles and responsibilities of intermediaries in the commercial insurance market.
- Evaluate the impact of market trends and regulatory requirements on intermediary relationships.
- Develop strategies to enhance communication and collaboration between intermediaries and the organisation.
- Implement processes to monitor and improve intermediary performance and market reach.
- Demonstrate the ability to resolve conflicts and negotiate effectively with intermediaries.
- Design a relationship management plan that aligns with organisational goals and market demands.

WHO SHOULD ATTEND

- This course is designed for insurance professionals, including broker consultants, relationship managers, and underwriters, who are responsible for managing intermediary relationships in commercial or corporate insurance settings.

COURSE OUTLINE

Day 1: Intermediary and Market Relationship Management

- Overview of insurance intermediaries: brokers, agents, and advisors.
- Regulatory framework: FAIS, FICA, and COFI.
- Roles and responsibilities of intermediaries.
- Market segmentation and distribution channels.
- Relationship management principles: communication, trust, and service.
- Performance monitoring and compliance.
- Conflict resolution and ethical practices.
- Case studies on intermediary market management.

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 **3 NQF credits** at **NQF Level 5**.

PRICING (PER DELEGATE, EX-VAT)

Delegates	Training Method	Price per Delegate	Total
1	Online	R 13,400.00	R 13,400.00
1	In-House	R 17,400.00	R 17,400.00
1	On-Campus (Pretoria)	R 20,200.00	R 20,200.00

UPCOMING SESSIONS

Start	End	Method	Venue
10 Aug 2026	10 Aug 2026	On-Campus	Dubai, UAE
11 Aug 2026	11 Aug 2026	On-Campus	Pretoria, South Africa
12 Aug 2026	12 Aug 2026	On-Campus	Abu Dhabi, UAE
13 Aug 2026	13 Aug 2026	On-Campus	Durban, South Africa
13 Aug 2026	13 Aug 2026	On-Campus	Mauritius
14 Aug 2026	14 Aug 2026	On-Campus	Cape Town, South Africa
17 Aug 2026	17 Aug 2026	On-Campus	Pretoria, South Africa
18 Aug 2026	18 Aug 2026	On-Campus	Abu Dhabi, UAE

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 243160) 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.

Accredited Africa Training Institute for Capacity Development

Unit FO409, Hatfield Plaza, 1122 Burnett St, Hatfield 0028, Pretoria, Gauteng, South Africa
Tel: +27 12 004 8389 · WhatsApp: +27 65 077 6310 · apply@aaticd.co.za · www.aaticd.co.za