

**VOCATIONAL CURRICULUM -2006  
(With effect from the Academic year 2006-2007)**

**CURRICULUM OF INTERMEDIATE VOCATIONAL COURSE  
IN  
INSURANCE & MARKETING**



**STATE INSTITUTE OF VOCATIONAL EDUCATION  
OFFICE OF THE COMMISSIONERATE OF INTERMEDIATE EDUCATION, A.P.,  
NAMPALLY, HYDERABAD.**

**&**

**BOARD OF INTERMEDIATE EDUCATION A.P.,  
NAMPALLY, HYDERABAD.**



## **INTRODUCTION**

Insurance is gaining a very extensive recognition both private and public sector in business world. It has been increasing day by day.

Insurance is one such subject which has been included in the Vocational Stream and for the purpose this booklet has been prepared giving there in the areas where wage employment and self generated employment would be available in plenty and for which love competencies have been identified. The syllabus has been fully recasted keeping in view the various alternatives available to the Intermediate students out of the Vocational Streams in Insurance.

At present 33 Vocational Courses are offered at Intermediate Level in Andhra Pradesh. As per the guidelines given in the National policy on Education, all the Vocational Courses are terminable in nature. To meet the requirement of user organizations, it is decided to introduce Insurance Vocational course. The Present day curriculum is so framed to meet the challenges on one side and the requirements on the other.

It is therefore felt necessary to convert the Vocational Courses as Job oriented courses and to re-vamp the syllabus for the existing Vocational courses, accordingly; to accomplish this task it is decided to conduct the curriculum development work shops with experts committees. The members entrusted with the task of preparation of syllabi are hailed from various reputed Organizations and Institutions of varied nature i.e. academicians, professionals and stakeholders.

In view of the above a committee has been constituted for revision of syllabus and the names of the members who have participated in this task are mentioned overleaf.

**LIST OF PARTICIPANTS**

- 1 Sri K.V.V.Satyanarayana,  
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O/o the Commissioner of Intermediate Education,  
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2. Smt. T. Leela Raj,  
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O/o the Commissioner of Intermediate Education,  
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Jubilee Hills,  
HYDERABAD.
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SECUNDERABAD.
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HYDERABAD
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Admn. Officer,  
National Insurance company limited,  
CHITTOOR
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RNIS College of Insurance,  
Met life,  
Somajiguda,  
HYDERABAD.
8. Sri N.L.V.N. Raja Sekhar,  
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Government Junior College ( Boys)  
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**SCHEME OF INSTRUCTIONS AND EXAMINATIONS**

**ANNUAL SCHEME OF INSTRUCTION AND EXAMINATION FOR  
1<sup>st</sup> YEAR & 2<sup>nd</sup> YEAR  
INSURANCE & MARKETING**

S.No.	Subject	Theory		Practicals		Total	
		Periods	Marks	Periods	Marks	Periods	Marks.
1	English	185	75	-	-	185	75
2	G.F.C	185	75	-	-	185	75
3	Vocational subjects.						
I	Paper -I	160	50	160	50	320	100
II	Paper _II	160	50	160	50	320	100
III	Paper - III	160	50	160	50	320	100
IV	On the Job Training ( OJT)	( As per industry/establishment /Organization timings)			50		50
		850	300	480	200	1330	500

**SCHEME OF INSTRUCTIONS PER WEEK  
1<sup>st</sup> YEAR & 2<sup>nd</sup> YEAR**

S.No.	Subject	Theory	Practicals	Total
1	English	6	-	6
2	G.F.C.	6	-	6
3	i) PAPER-I	5	5-	10
	ii) PAPER-II	5	5	10
	iii) PAPER-III	5	5	10
	Total	27	15	42

## **A] OBJECTIVES OF THE INSURANCE & MARKETING**

- 1 To impart basic knowledge in life and Non-life Insurance subjects Like**
  - a) Elements of Insurance
  - b) Law of Insurance
  - c) Technical practice
  - d) Administration
- 2 To provide operational skills in:**
  - a) Communication – Oral and written
  - b) Handling technical documents with proper understanding.
  - c) Using computers to get required data in various transactions.
- 3. To create abilities :**
  - a) To develop innovativeness in reducing procedures, time lag, documentation.
  - b) Motivating customers.
  - c) To Spread cordial relationships
  - d) To identify himself/herself with the organization to become part of it.

## **B] JOB OPPORTUNITIES**

- 1 Wage Employment Availability of Jobs As Office Assistants In**
  - i) General Insurance Corporation and its Offices.
  - ii) L.I.C. and its offices
  - iii) A.P. State Life Insurance Corporation Offices.
  - iv) E.S.I. Offices.
  - v) Retail Marketing Sales Assistants / Representatives
- 2. Self Employment**
  - i) Career agents in both LIC & GIC
  - ii) To work with consultants
  - iii) To work as Tracers cum Investigators.
  - iv) To assist surveyors.
  - v) Retail Trade / Marketing /Agencies

## **C] SKILLS TO BE PROVIDED TO THE STUDENTS :**

- 1. Communication and inter-personal relations**
  - a) With staff including field staff and agents
  - b) With customers.
- 2. Drafting skills.**
  - a) Correspondence with higher Officers
  - b) Inter department customers.
  - c) Agents and field staff.
  - d) Computer skills.
- 3. Motivation :**
  - a) Oral
  - b) Written
- 4. Preparation of documents, Registers and other Records**
  - a) New Business
  - b) Customer service

- c) Employees including field staff and agents
- d) Suppliers, dealers and others.

**5. Computational skills**

- a) Understand the processes involved in various types of transactions.
- b) Ability to execute programmes for various types of transaction

**6. Office procedures :**

- a) Technical
- b) Administrative

**D. VERTICAL MOBILITY**

**B.COM, B.A., B.B.A, C.A., I.C.W.A AND COMPANY SECRETARY SHIP**

**INSURANCE AND MARKETING COURSE**  
**SYLLABUS I YEAR THEORY PAPER -I**

**ELEMENTS OF COMMERCE & ACCOUNTANCY**

(For Banking & Insurance Courses)

**PERIODS: 160**

- |           |   |           |
|-----------|---|-----------|
| <b>01</b> | <b>BASIC CONCEPTS</b>   | <b>10</b> |
|           | Trade-Commerce-Business-Industry and Management – Meaning, Definition, Characteristics, Objectives and classification.  |           |
| <b>02</b> | <b>NON-CORPORATE BUSINESS UNITS</b>   | <b>10</b> |
|           | Sole Trader – Joint Hindu Family – Cooperative Society – Partnership: Formation, Registration, Distinctive Features; Merits, Demerits, Kinds of partners – Rights, Duties and Liabilities of partners.  |           |
| <b>03</b> | <b>CORPORATE ENTERPRISES</b>  | <b>12</b> |
|           | Joint stock Company, Public and Private Limited, Promotion – Role of Promoters – Incorporation of a company – Important documents – Memorandum of Association, Articles of Association, Prospectus, Statement in lieu of Prospectus – Registration – Certificate of Incorporation – Certificate of commencement of Business – Different types of companies: Features privileges, Merits and Demerits. |           |
| <b>04</b> | <b>PUBLIC ENTERPRISES</b>   | <b>07</b> |
|           | Public sector Enterprises: Need, Features, Forms, Merits and Demerits – Multinational Corporations: Concepts, Meaning, Features, Merits and Demerits.   |           |
| <b>05</b> | <b>OFFICE ORGANIZATION</b>  | <b>08</b> |
|           | Nature and significance of office – Functions of office – Organization of records – Filing and indexing systems – Office communication – Inward and outward correspondence – Office mechanization: Use of computers, Fax, E-mail, Pagers.   |           |
| <b>06</b> | <b>INSURANCE</b>  | <b>08</b> |
|           | Concept of Insurance – Need and significance – Types of Insurance (Life, Fire, Marine Insurance) – Policies and procedures.   |           |
| <b>07</b> | <b>MARKETING SYSTEM</b>   | <b>12</b> |
|           | Meaning and significance of marketing – Marketing Vs Selling – Functions of marketing – Channels of distribution – Role of wholesalers and retailers – Tele-marketing – E.Commerce – Transport and warehousing – Types of transport – Merits and Demerits – Need and significance of warehousing – Types of warehousing.  |           |
| <b>08</b> | <b>ADVERTISING</b>  | <b>10</b> |
|           | Concept of advertising – Need and significance – Advertising media and their advantages and disadvantages – Positive and negative effects of advertising  |           |
| <b>09</b> | <b>FOREIGN TRADE</b>  | <b>07</b> |
|           | Basics of foreign trade – Distinction between foreign and home trade – Export and Import trade – Procedures and formalities – Customs duties and Excise duties  |           |

<b>10 STOCK EXCHANGE</b>	<b>15</b>
Meaning and significance of stock exchange – Functions of stock exchange – Listing of securities – Meaning and significance of speculation – Stock exchange operations (Bulls, Bears, Stags, Jobbers and Brokers)	
<b>11 INTRODUCTION TO BOOK KEEPING AND DOUBLE ENTRY SYSTEM</b>	<b>05</b>
Book keeping Vs Accountancy - Uses of Accounting – Accounting Concepts – Accounting conventions – Meaning of double entry system – Classification of Accounts – Advantages of double entry system	
<b>12 JOURNAL</b>	<b>05</b>
Introduction – Journalising of different transactions – Advantages of Journal	
<b>13 LEDGER</b>	<b>06</b>
Meaning – Ledger postings – System of balancing the account – Advantages of Ledger	
<b>14 SUBSIDIARY BOOKS</b>	<b>05</b>
Different types of subsidiary books: Purchases book, Sales book, Purchase return book, Sales return book, Bills receivable book, Bills payable book, Journal proper	
<b>15 CASH BOOK</b>	<b>08</b>
Meaning and significance – Kinds of cash book: Simple cash book, Cash book with cash and discount, Cash book with cash, discount and bank, Cash book with bank and discount columns – Analytical petty cash book	
<b>16 BANK RECONCILIATION STATEMENT</b>	<b>07</b>
Meaning and significance – Pass book – Need for reconciliation – Causes of differences – Methods of preparing bank reconciliation statement balance method, overdraft method.	
<b>17 FINAL ACCOUNTS</b>	<b>10</b>
Significance of Trial Balance – Trading Account proforma – Proforma of Profit & Loss account – Preparation of Balance Sheet – Arrangement of Assets and Liabilities – Adjustments.	
<b>18 AVERAGE DUE DATE</b>	<b>05</b>
Meaning of average due date – Advantages – Calculation of average due date	
<b>19 SMALL BUSINESS ENTERPRISE ( SBE)</b>	<b>10</b>
What is SBE – How to promote SBE- How to run – Basic principles of managing small enterprise – What form of support of available from Government of Andhra Pradesh, DRDA, Industries Department, APSIDC, SIDBI, APSFC, OVISIET, Commercial Banks – Training – SC/ST/BCs – Project Report for setting up a SBE.	

**INSURANCE AND MARKETING COURSE**  
**SYLLABUS I YEAR THEORY PAPER -II**

**PRINCIPLES AND PRACTICE OF INSURANCE**

**PERIODS : 160**

- |    |  |    |
|----|--|----|
| 1. | Concept of risk-financial & Non financial risk – classification of risk – Management of Risk – Risk analysis- Risk Assessment – Risk Transfer  | 20 |
| 2. | Nature & functions of Insurance – Insurance Transaction – Publicity – Proposal form – Insurance Policy – Policy schedule – Insurance agent, functions of the agent – Agency Law- Insurance surveyor – Government as Insurance.   | 20 |
| 3. | History & Development of Insurance – Life Insurance – General Insurance – structure of Insurance Market in India – Need for professionalizing in Insurance Business – Regulation of Insurance.   | 10 |
| 4. | Classification of Insurance Business – Long Term Assurance Business – Classification of General Insurance Business – Health Insurance – Engineering Insurance – Liability Credit and survey ship Insurance –Introduction Insurance – Miscellaneous Insurance – Group policies. | 15 |
| 5. | Financial Aspects of Insurance – Shareholders funds – Principal share capital –profit & loss A/cs- Premiums- Determination of premium rates – Commercial considerations – Premium Reserves – Claims – Re insurance – Annuities – Nature, types.                                | 15 |
| 6. | Basic Principles – utmost good facts – Insurable interest – Indemnity – corollaries of indemnity – Proximate cause.  | 20 |
| 7. | Agent – Agents Regulations – Agency as a profession – premiums and bonus – Calculation of age, premium, Bonus, Interim Bonus – life Insurance products – underwriting – Policy conditions – Assignments nomination – Alterations.  | 30 |
| 8. | Personal Development – Product Knowledge – Motivation – moral communication skills – Analytical ability.   | 15 |
| 9. | Law and Regulations – Insurance Act 1938- LIC Act. 1956 IRDA Act. 1999 – Consumer Protection Act 1986 –ombudsman   | 15 |

**Ref. Books : I.C. of III :01, 33,02,26**

**INSURANCE AND MARKETING COURSE**  
**SYLLABUS I YEAR THEORY PAPER -III**

**INFORMATION TECHNOLOGY SKILLS FOR FINANCIAL SERVICES**

**PERIODS: 160**

<b>I</b>	<b><u>INTRODUCTION TO COMPUTERS</u></b>	<b>2</b>
	<b>A BRIEF HISTORY AND FUNDAMENTALS OF COMPUTERS</b>	<b>2</b>
	<b>B IPO CYCLE</b>	<b>2</b>
	<b>C INPUT DEVICES:</b>	<b>2</b>
	Key Board	
	Scanner	
	Bar Code Reader	
	Voice Input Systems	
	Touchtone Device	
	Mouse Operations.	
	<b>D OUT PUT DEVICES</b>	<b>2</b>
	i) MONITOR:	
	LCD	
	Mono Chromc	
	Colour	
	Touch Screen	
	ii) PRINTERS	
	Dot Matrix	
	Ink Jet	
	Laser	
	Thermal	
	<b>E INTRODUCTION TO CPU</b>	<b>2</b>
	M/B	
	CD Rom	
	Floppy	
	USB Drives	
	<b>F INTRODUCTION TO STORAGE DEVICES /CONCEPTS IN COMPUTERS.</b>	<b>2</b>
	Memory	
	Hard drive	
	Pen Drives	
	Memory Skills	
	<b>G INTRODUCTION TO SOFTWARE:</b>	<b>2</b>
	Languages	
	System Software	

## Application Software

<b>II</b>	<b>OFFICE AUTOMATION :</b>	
<b>A</b>	<b>Introduction To Ms-Office</b>	<b>3</b>
<b>B</b>	<b>Introduction To Word Processing And Explaining The Difference Of Manual &amp; Electronic Word Processing</b>	<b>30</b>
	Introduction	
	Anatomy Of Word Window	
	Importance Of Tool Bars	
	Importance Of Short Cuts	
	Menu Bar Explanation	
	Creating A Document	
	Editing A Document	
	Formatting A Document	
	Saving A Document	
	Previewing & Printing A Document	
	Closing A Document	
	Designing Template.	
<b>C</b>	<b>INTRODUCTION TO SPREAD SHEETS</b>	<b>30</b>
	Explaining Difference Between Manual & Electronic Spread Sheets.	
	<b>MS EXCEL:</b>	
	Introduction	
	Anatomy Of Excel Window	
	Importance Of Tool Bars	
	Importance Of Short Cuts	
	Menu Bar Explanation	
	Creating Excel Work Book	
	Creating A Work Sheet	
	Rows & Columns	
	Entering Information Into Work Sheets	
	Editing Work Sheets	
	Formatting Work Sheet	
	Formula Generation	
	Macros	
	Sorting	
	Filtering	
	Templates – Designing.	
<b>D</b>	<b>INTRODUCTION TO ELECTRONIC PRESENTATIONS MS- POWER POINT</b>	<b>30</b>
	Introduction	
	Anatomy Of Power Point Window	
	Importance Of Tool Bar,	

Shortcuts, Menu bar  
 Creating, Ending, Modifying,  
 Formatting Presentations.  
 Creating Presentations With Auto Content Wizard

**E NET WORKING & DATA COMMUNICATIONS 12**

Introduction To Net Working & Data  
 Communications  
 Hard Ware Requirement Of Networking & Data  
 Types Of Wired Networks  
 Types Of Wireless Networks.  
 Lan  
 Wan  
 Man

**F INTERNET 12**

History  
 Www  
 Browsing  
 Internet Explorer / Browsing Software  
 Web Site & Web Pages  
**DNS** GDNS  
 NGDNS.

**G ELECTRONIC MAIL 12**

Sites To Create E Mail  
 Creating E Mail Account  
 Managing E Mail Account  
 Sending & Receiving E Mails  
 Attachments. ( Files & Photos)

**H CALCULATOR 3**

Importance Of Calculators  
 Using For Calculations

**I MANAGEMENT INFORMATION SYSTEM (MIS) INTRODUCTION 14**

Importance of MIS In Banking & Financial Sector Transaction,  
 Processing and Information Report Systems.

**INSURANCE AND MARKETING COURSE**  
**SYLLABUS I YEAR PRACTICALS PAPER -I**

**ACCOUNTANCY**

(For Banking & Insurance Courses)

**PERIODS: 160**

<b>01</b>	Identification of Heads of Accounts relating to Personal a/c, Real a/c and Nominal a/c	<b>14</b>
<b>02</b>	Filling of various types of vouchers like receipts including cash and cheque / Payments including cash and cheque / Petty cash vouchers	<b>16</b>
<b>03</b>	Recording of transactions in Journal Proper	<b>14</b>
<b>04</b>	Postings from Journal to Ledger Accounts	<b>14</b>
<b>05</b>	Preparing Subsidiary books	<b>07</b>
<b>06</b>	Posting transactions to cash book and petty cash book	<b>14</b>
<b>07</b>	Preparing Trial balance from Ledger Accounts and identifying errors and their rectification	<b>14</b>
<b>08</b>	Preparing Trading and Profit & Loss Account	<b>28</b>
<b>09</b>	Preparing Balance sheet with adjustments While doing practical problems for final accounts	<b>28</b>
	> A) Emphasis in detail should be given to organizations like sole trading Concern and partnership	
	> B) Emphasis in brief should be given to organizations like companies, Cooperative societies & non profit making organizations and receipts & Payments of professionals where no P&L a/c required	
<b>10</b>	Preparing and filing of Sales Tax /Value added tax returns & awareness of Submitting of financial statements to bankers/others and filing of Income Tax returns.	<b>10</b>

**INSURANCE AND MARKETING COURSE**  
**SYLLABUS I YEAR PRACTICALS PAPER -II**  
**PRINCIPLES AND PRACTICE OF LIFE INSURANCE**

**PERIODS : 160**

1. Policy Documents – format – policy preamble – schedule – 20  
Attestation conditions and privileges – alteration – duplicate policy – specimen copy of policy document.
2. Premium payment calculations – lapse – Renewal – Surrender values 20  
–Financial Planning – Meaning – Need – Terminology – Present value – future value – Pay back period - Non future options – Revival
3. Assignment – nomination – Loan & Surrenders – fore closure – 20  
Practical problems
4. Calculations of Maturity claims survival benefits – Death claims – 20  
claim concession – Accident Benefit and Disability benefit – Post maturity options – settlement options – Valuation & Surplus.
5. Accounting Procedure – Premiums – Premium accounting – 20  
Disbursement Policy payment including claims.
- 6 Accounting Procedure – Expenses of management – Advances to 20  
agents – Investments.
7. Final Accounts – Revenue Account & Balance sheet of life Insurance 20  
Business
8. Financial Analysis – Analysis of Financial statements – Trend 20  
analysis Ratio analysis – Funds flow statement – Cash flow statement

**Ref. Books: IC: 02,26**

**INSURANCE AND MARKETING COURSE**  
**SYLLABUS I YEAR PRACTICALS PAPER -III**  
**INFORMATION TECHNOLOGY SKILLS FOR FINANCIAL SERVICES**

MS – DOS

PERIODS: 160

- Files : Text Files , Command Files, File Naming Conventions **5**
- Creating a File ( Copy Con) Type ( Displaying file Contents) **5**
- Copying a file, Delete, wildcard Characters ‘\*’ Asterisk ‘?’ Question Mark **5**
- Dir Command, Complete Dos – Text Editor, Copy Command, PRN Command **5**
- Combine(+), Del Command, REN Command, **5**
- **Subdirectories** **10**  
 Making Directories (MD), PATH, # Changing Directory (CD)  
**Copying Directories, Deleting Directories, Creating Multiple Directories**  
 Current dir ( . ) And Parent Directory ( .. ), Removing Directories ( RMDIR)  
 Searching Files in Subdirectories, Changing the Screen Display PROMPT Command.
- WINDOWS – 98 OPERATING SYSTEM** **10**  
**# Elements of Windows – 98 Interface.**
- My Computer, My Documents, Recycle Bin, Taskbar, Shortcut Menus
- # **Starting a Program ( Application)**
  - Start Menu, Programs Menu, Documents Menu, Settings Menu, Find and Help
  - Run Menu, Shutdown Menu, Log-Off Menu
- # Customizing Windows **5**  
**NOTE PAD**  
 Minimizing, Maximizing., Manually Resizing a Window, Moving, Closing # Shutting Down the PC, Stand by, Shut Down, Restart, Log Off Windows
- MANAGING FILES AND FOLDERS** **10**  
 # Folders # My Computer Folder # My Document Folder  
 Notepad Creating Text Files, Editing Text Files, All the Menu Features of Notepad.
- DRAWING PICTURES WITH PAINT**  
 Starting Windows Paint, Drawing with Pencil Tool, Drawing the Picture with Tools.  
 Embedding a Paint Object, Linking a Paint Object, Previewing Painting Working in Windows explorer.
- MICRO SOFT WORD** **20**  
 Getting Started with MS-Word
  - **Contents of the Word Window**  
 Tile bar, Menu bar, Toolbar, Ruler, Document window,

Scrollbar,  
 Status bar  
 Office Assistant, Document Navigator, View Buttons

- Work with Word Documents
  - Creating a Document, Moving around the Documents, Saving a Document
  - Closing a Document, Opening an Existing Document, Getting around the Document.
- Changing Views
- Formatting Documents
  - Selecting Text, Reversing Actions, Editing Text, Deleting Text, Moving and Copying
  - Drag and Drop feature, Formatting , Changing Document Margins

## **Numbering Pages, Page Breaks, Alignment, Spacing, Line Spacing 20**

- **Bullets and Numbering**
    - Creating Bulleted/Numbered Lists, Changing Bullet Styles and Numbered List
  - **Tables**
    - Creating Tables, Entering and Editing Text in a Table, Selection in Tables
    - Changing Table Structure, Inserting Rows and columns, Deleting Rows and Columns
- Formatting the tables, Merging Cells, Splitting cells.**
- Finding and Replacing Text, Editing and Proofing Text
  - Spell Check, Checking Grammar, Using Thesaurus, Auto Correct
  - Mail Merging
    - Printing
    - Print Preview
  - Getting Help
  - Quitting Word
  - Shortcut Keys

## **MS – EXCEL 20**

Starting MS-Excel, Contents of the Ms-Excel Window

What is a workbook, using sheets in a workbook, entering Data, The Data Type

Entering Column Titles, Entering Numbers, Editing Data, Selecting Cells

Copying Data, Moving Data, Drag-and –Drop Feature

Clearing Cell Contents, Saving a workbook, Closing a

## Workbook

Working with Worksheets, Selecting Worksheets, Renaming Worksheet.

Inserting and Deleting Worksheets, Changing the order of Worksheets

Copy worksheets, Restructuring Worksheets, Formatting Data Calculations using formulae.

Aligning Cell Contents, Creating Borders, Fonts, Orientation of Text

Entering Data quickly.

Charts, Components of a Chart, Drawing a Chart

Creating and Editing a Database, Data Form, Searching Data, Sorting Data

Filtering, Data Query Using Auto Filter, Turning Off Filter, Crating Subtotals.

Auditing

Other Commands available in Tool and Data menus

Getting help in excel

Short cut commands

Printing in Excel.

## **MS- POWER POINT**

20

Starting power point

Importance of presentations

Window Description Presentations

Slides

Handouts

Speaker's Notes

Outlines

Media Clips

Organization Charts

Graphs

Starting MS- Power Point

The MS-Power Point Window

The MS-Power Point

Views

Slide View

Slide Sorter View

Outline View

Notes Pages View

Slide Show View

Presentations and Slides

Creating a new Presentation

Creating a new Slide

Changing the layout for a Slide

Deleting a Slide

Running a Slide Show

Saving a Presentation

Closing a Presentation

Exiting MS-Power Point  
 Opening a Presentation.  
 Changing the Order of the Slides  
 Editing the Slide Master  
 Changing the colour Scheme  
 Changing the background  
 Adding clip Art  
 Organization Charts  
 Drawing Objects  
 Working with the Slide Show  
 Setting up a Slide Show  
 Controlling the Slide Show  
 Adding transition to the Slide Show  
 Setting slide timings  
 Getting help  
 Printing a Presentation.

## **INTERNET TECHNOLOGIES**

20

Getting Connected to Internet  
 Protocols  
 Web Browsers  
 Internet Explorer  
 Window And its Detailed Explanation
 

- Drawing the Window
- Tool Bars

 Detailed Explanation About
 

- Standard Buttons Bar
- Address Bar
- Status Bar

 . Internet Addressing System  
 . Domain Naming System  
 . Web Search Engines  
 . E mail  
 . Creating E mail Accounts  
 . Composing Mails  
 . Sending Mails  
 . Sending Mails  
 . Receiving Mails  
 . Out Look Express  
 . Window and its Detailed Description  
 . Configuring Mail Accounts.  
 . Sending and Receiving mails.

**INSURANCE AND MARKETING COURSE**  
**SYLLABUS II YEAR THEORY PAPER -I**

**GENERAL INSURANCE**

**PERIODS: 160**

1. Principles of General Insurance – Insurance Documents – Basis of Rate making. Other acts relating to General Insurance 20
2. Fire Insurance – General conditions – Tariff system - Types of Policies – Rules for cancellation of Policy. 20
3. Marine Insurance – Marine policies – Rating & Underwriting – Dody Insurance – Increased value Insurance – Tariff policies Claims 20
4. Motor Insurance – Legal aspects I&II – Motor policies I&II – Motor tariffs – Documents – Underwriting –Claims – Own Damage claims – Claims-II – Third party liability claims. 20
5. Personal Accident Insurance – Types of Disablement – Policy conditions – Raising – Risk Group I, II, III – Age limits – Group personal Accident policy – Claims – New Schemes. 20
6. Health Insurance - Medi claim policies – Proposal form – Schedule of the policy. 20  
TPAs – their role – settlement of the claims –liasoning with Hospitals & Nursing Homes.
7. Overseas Medical Policy – Burglary Insurance – Money Insurance – Fidelity Guarantees. 20
8. Bankers Blanket & Jewelers Block Policies- other miscellanies policies like Pedal cycle Insurance – Plat glass Insurance – Missing Documents Indemnity – Blood stock Insurance – Pet Dog Insurance – sports Insurance – Shop keepers Insurance policy – House holders Insurance policy 20

**Ref. Books : IC: 34,72,73**

**INSURANCE AND MARKETING COURSE**  
**SYLLABUS II YEAR THEORY PAPER -II**  
**MARKETING & PUBLIC RELATIONS**

**PERIODS: 160**

1. Insurance Business – Environment – Regulatory Environment – 30  
 Legal Environment- Economic environment – Social Environment  
 – Political Environment – Industrial Environment, Commercial  
 Environment – Financial Environment – Insurance Business  
 abroad
2. Basic marketing Principles – Basics of Financial Planning – 25  
 Consumer Behavior – Salesmanship – Selling process –  
 preapproach and approach – Interview & Close – Handling  
 objections – service – Building relationships
3. Introduction to services - Quality in services – Strategies for 25  
 insurance marketing I & II – Rural Insurance – Consumerism &  
 Ethics
4. Distinction between goods and service marketing – The 7 “P” 20  
 frame work – product, price, promotion, process, people, and  
 Physical evidence – Marketing techniques – prospecting, sourcing,  
 approach, business closing, post sales service.
5. Role of Intermediaries in Insurance marketing – Advisors – 20  
 Corporate agency – Broker – Recruitment- Training –  
 Remuneration – Career opportunities in Insurance
6. Customer Relationship management (CRM) – Concept of CRM – 20  
 Difference between transactional relationship and marketing- Need  
 for CRM – Concept of call centre in Insurance marketing –  
 Significance – Concepts of cross selling and up selling – Data base  
 of customer
7. Soft skills and personality development : Communication skills, 20  
 presentation skills, self confidence, human relations, effective time  
 management, goal setting, life skills etc.,

**INSURANCE AND MARKETING COURSE**  
**SYLLABUS II YEAR THEORY PAPER -III**

**RETAIL MARKETING**

**PERIODS: 160**

1. Marketing – Functions of marketing – Channels of Distribution – 20  
 Role of whole sellers & Retailers – Features of multiple shops-  
 Department stores – Mail order Business – Tele marketing – E-  
 Commerce – Super Bazar – Transport and warehousing- Types  
 of Transport merits & Demerits – Types of warehousing.
2. Types of Retailers – General Stores – Convenience stores – 20  
 specialty stores – malls – super markets – cooperative stores -  
 Rythu Bazars, Mandis, Daily & Weekly.
3. Stores layouts & Design – Factors influencing the location stores 20  
 layout importance – factors considered for gross layout
4. Buying port folio – Factors influencing in selection of goods 20  
 analysis of demand for different products, product mix-effective  
 buying – time of purchase – discounts, delivery etc. Role of  
 grading & standardization - Brokers, Commission Agents –  
 Door to Door Marketing. Perishable & Non perishable goods  
 markets.
5. Pricing & Promotion – Product cost and mark up pricing- factors 20  
 determining pricing – Maintenance of regular price – Types of  
 sales promotion – Windows & Interior display –planning for  
 displays – consumer promotion – trade promotion - Publicity –  
 Advertising – Techniques, Print, electronic – Indoor, Outdoor  
 Media
6. Merchandise control: Need for control – Types of inventory 20  
 control – Inventory systems – calculation of turnover rate –  
 methods for improvement.
7. Packing & Delivery: Importance of packing, life packing, 20  
 Procedure for delivery of goods at the counters and at home.  
 Discounts, gifts, offers, etc.- After sales service – Customer  
 satisfaction and attraction. -Documents used in selling - Cash  
 memo's, Invoice, Delivery note etc. -
8. Social Marketing 20  
 Event Management – functions, etc as goods & service  
 providers, product – Goods & Services – Marketing &  
 Salesmanship, Agriculture Marketing, Market Yards , Marketing  
 Societies - Rural & Urban marketing - Agriculture Godowns

**INSURANCE AND MARKETING COURSE**  
**SYLLABUS II YEAR PRACTICALS PAPER -I**  
**PRACTICE OF GENERAL INSURANCE & OTHER INSURANCE**

**PERIODS: 160**

1. Insurance – Market – Insurance forms – proposal forms – proposals for Insurance – certificate of Insurance – Endorsements – Co – Insurance 20
2. Fire & Marine Coverages – Standard policies – Fire Insurance converges - Reinstatement value policy – Types of Marine polices – Special declaration policy – Duty and increased value Insurance 20
3. Miscellaneous converges – specialized insurances 25
4. Rating – Market agreements – premium calculation – underwriting practice – New Business Procedure – Renewal procedure – Books. 25
5. Claims – Reactionary procedure – Investigation & assessment claims documents – settlement – recoveries 25
6. Investment & Accounting in respect of General Insurance Business – General Ledger – Income and Outgo – Trial balance – Revenue Account – Profit & loss Account – Balance Sheet – Returns 25
7. Health Insurance – Sickness – Various Health Riders in Policies - Practicals 20

Ref. Books : IC:11

**INSURANCE AND MARKETING COURSE**  
**SYLLABUS II YEAR PRACTICALS PAPER -II**  
**MARKETING & PUBLIC RELATIONS PAPER -II**

**PERIODS: 160**

- |    |  |    |
|----|--|----|
| 1. | Fundamentals of Agency Law - Practicals  | 25 |
| 2. | Functions of agent – requirement of agent – surrender value calculations – age calculations.- Practicals   | 25 |
| 3. | Paid up value calculations – approaches of agents – Practicals   | 40 |
| 4. | Process of Business communications – Encoding, message, media, Transmitting receiving decoding and response – tools for communications – sales manuals – catalogues – Price lists – Practicals | 25 |
| 5. | Collect data from different types of Insurance companies regarding their polices, plans etc. and differentiate the benefits to the consumer so that he can pickup the best.                    | 25 |
| 6. | Buyer Behaviour – classification of buyers – buying motives – Factors influencing for purchase of a product – frequency, Place & Unit of purchase  | 20 |

**INSURANCE AND MARKETING COURSE**  
**SYLLABUS II YEAR PRACTICALS PAPER -III**  
**RETAIL MARKETING PAPER -III**

**PERIODS: 160**

1. Visit to different types of retail outlets/shopping complex to observe the following 20
  - a) Types of stores and their location
  - b) Various ways of stores layout location of departments etc.
  - c) Arrangement of products in racks. Etc.
  - d) Exterior and Interior designing of the store..
2. Holding discussions with the owners management of a few retail stores to find out as to how they decide which products to stock and sell. 15
3. Exercise in assessing the demand for selected products in given area 15
4. Exercise in preparation of stock register, bin card etc stock taking and preparation of list of existing stock. A visit to the school store or some other store during its stock taking period can be quite helpful. 15
5. A visit to a few retail stores to find out what sales promotion schemes are being used by them also ascertain their usefulness to the retail stores. 20
6. Collection of Information in respect of shopping behavior of people – say unit of purchase, frequency, reasons for purchase with regard to a few selected consumer products with the help of a questionnaire administered to a select number of shoppers. 15
7. Practice and simulated exercise in organizing clearance sales and other sales promotional activities of a retailer. 20
8. Visit to manufacturing marketing establishment in order to provide the students exposure in various methods of packing and marking there on. 20
9. The student should be aware of handling event management independently. He should be given to handle the live functions like College day maintenance, retirement functions, farewell parties etc. 20

**INSURANCE AND MARKETING COURSE**  
**MODEL QUESTION PAPER I YEAR THEORY PAPER-I**  
**COMMERCE AND ACCOUNTANCY**

**Time: 3 Hours**

**Max. Marks. 50**

**I. Answer all Questions:**

**10 X 2 =20**

1. Define Business
2. Give the classification of various kinds of partners
3. Define Prospectus
4. Explain public enterprises
5. What is office Mechanization?
6. What are the different types of Insurance?
7. What are channels of Distribution
8. Define contra entry
9. Explain the classification of Accounts
10. What is average due date

**II. Answer any Five Questions:**

**5 X 6=30**

11. What do you mean by Sole trading business? Describe its merits and demerits
12. Explain the procedure for Incorporation of Company
13. Explain the functions of Stock Exchange
14. Explain the procedure for filling of sales tax / Vat returns in the given form
15. Prepare Bank Reconciliation statement as on 31.12.2006 from the following particulars:
  1. Bank overdraft as per cash book Rs.6,220
  2. A cheque issued to Raja for Rs.2630 was not encashed from the bank
  3. An amount of Rs.500 was collected by the Bank. The same is not recorded in cash book
  4. Interest on overdraft Rs.150 was debited in the pass book only
  5. A cheque for Rs.1,000 received, but it was not sent to the bank
  6. Bank charges of Rs.50 debited in the pass book only

16. From the following information prepare Three column cash book

		Rs.
2006		
March 1	Cash in Hand	10,000
	Cash at Bank	10,000
March 2	Received Cheque from Gopal	18,000
	Discount allowed	200
March 2	The above cheque was sent to the bank	
March 8	Drawn from the bank for office use	6,000
March 14	Mr.Rao directly deposited a Cheque into the bank	4,000
March 22	Bought furniture	2,000
March 30	Cash remitted into the bank	1,800

17. From the following balances record the opening entry

	Rs.
Cash in Hand	2000
Bank overdraft	6000
Bills payable	3000
Bills receivable	8000
Creditors	10000
Debtors	30000
Plant & Machinery	70000

18. Calculate Average Due Date from the following particulars

Due date	Amount (Rs)
2006.	400
19.4.2006	300
09.5.2006	500
18.6.2006	200

**INSURANCE AND MARKETING COURSE**  
**MODEL QUESTION PAPER I YEAR THEORY PAPER-II**  
**PRINCIPLES AND PRACTICE OF INSURANCE**

**TIME: 3 HOURS**

**Max. Marks. 50**

**SECTION –A**

**ANSWER THE FOLLOWING QUESTIONS?**

**10X2 =20**

- 1 What is risk and classify the types of risk?
- 2 What are the functions of Insurance?
- 3 Who is an Insurance surveyor?
- 4 Define annuity
- 5 What is Re-Insurance?
- 6 What is Bonus?
- 7 Define motivation
- 8 Who is a consumer?
- 9 What is underwriting?
- 10 Classify the types of Insurance

**SECTION – B**

**II ANSWER ANY FIVE OF THE FOLLOWING**

**5x6 = 30**

- 1 Briefly classify the Insurance Business
- 2 Determine the procedure of fixing the premium rates for policies
- 3 Who is Agent and what are his regulations to become an agent
- 4 Describe the machinery for settlement of consumer disputes under consumer protection act-1986
5. Describe the principles of Insurance
6. What are the importance regulations of Insurance Regulatory Development Authority, 1999.
- 7 What are the contents in profit and loss A/c in Final Accounts of Life Insurance

**INSURANCE AND MARKETING COURSE**  
**MODEL QUESTION PAPER I YEAR THEORY PAPER-III**

**IT SKILLS FOR BANKING & FINANCIAL SERVICES**

**Time: 3 Hours**

**Max. Marks.50**

**SECTION –A**

**I ANSWER THE FOLLOWING QUESTIONS? 10X2 =20**

- 1 Draw the block diagram of the computer.
- 2 Write about – Input devices
- 3 Write a brief note on storage devices
- 4 Write a brief note on MS-Excel
- 5 Write a brief note on MIS
6. Write about the different views in EXCEL
- 7 How to create 'e-mail account? Write a brief note on it.
- 8 Write a brief note on wired communications.
- 9 Write the advantages of Electronic calculators.
- 10 How many types of monitors are available? Explain them in brief.

**SECTION – B**

**II ANSWER ANY FIVE OF THE FOLLOWING 5x6 = 30**

- 1 What is mail merging? Write a brief note on it.
- 2 Draw the Power Point window and write the detailed note on the parts.
- 3 Explain about Domain naming system.
- 4 Write the various views available in word and explain them in detail.
5. How many types of Generations are there in computers? Explain them in detail.
6. What are macros? Explain in detail.
- 7 What is networking and explain LAN, WAN, & MAN

**INSURANCE AND MARKETING COURSE**  
**MODEL QUESTION PAPER I YEAR PRACTICALS PAPER-I**

**ACCOUNTANCY**

**Time: 3 Hours**

**Max. Marks. : 50**

**ANSWER ALL QUESTIONS**

1. Identify the types of Accounts from the following particulars: 5
  - a) Rama A/c
  - b) Andhra Bank A/c
  - c) Machinery A/c
  - d) Salaries A/c
  - e) Interest A/c
  
2. Prepare the Specimen copy of Cheque and identify the difference between bearer cheque and account payee 5
  
3. Rectify the following errors: 10
  - a) Rent paid Rs.500 to Rama was not posted in the Ledger
  - b) The sales return book is overcast by Rs.150
  - c) The total purchase book has been undercast by Rs.250
  - d) Salary paid to Kiran Rs.1000 is debited to his personal account
  - e) Repairs to Building Rs.400 debited to Buildings A/c
  
4. Pass Entries in vouchers and enter in Journal, post into Ledger, and prepare final accounts of the following transactions: 20

2006		Rs.
January 1	Commenced business with cash	1,00,000
2	Bought goods for cash	10,000
3	Sold goods for cash	5,000
4	Purchased goods on credit from Mahesh	5,000
5	Sold goods to Venkatesh	2,000
6	Goods returned to Mahesh	1,500
6	Sold goods to Akhilesh for Cash	2,300
8	Venkatesh returned goods	800
9	Purchased office premises	2,00,000
11	Paid rent	2,000
12	Received commission from Kirthi	200
13	Received a Cheque from ABC Ltd	3,000
14	Issued a cheque to PQR Ltd	5,000
15	Paid college fees of his son	750
17	Paid for computers	30,000

**05.** From the following particulars of Mr.X file the Income Tax Return in SARAL form and calculate his tax liability : **5**

a) Income from Salaries	Rs.1,20,000
b) Income from House property	Rs.60,000
c) Income from Capital gains	Rs.45,000
d) Income from Business and Profession	Rs.25,000
e) Income from other sources	Rs.20,000

Mr.. X has savings in his General provident fund account/LIC etc  
Rs.42,000

**06. Record** **5**

**INSURANCE AND MARKETING COURSE**  
**MODEL QUESTION PAPER I YEAR PRACITALS PAPER-II**

**PRINCIPLES & PRACTICE OF LIFE INSURANCE**

**TIME: 3 HOURS**

**MAX. MARKS: 50**

**A] Answer Any Nine Questions Each Question Carries 5 Marks.**

**9X5=45**

- I Calculate paid up value :-  
 Sum Assured Rs.100000  
 Plan and Term : Endowment – 20 years  
 Date of commencement : 1<sup>st</sup> April 1990  
 Date of last unpaid premium : 1<sup>st</sup> April 2002  
 Mode of payment : yearly
- II Given the following data, what would be the amount of the surrender value available on 5<sup>th</sup> April 2003  
 plan and Term Endowment 31 years  
 Sum Assured Rs. 40000  
 Date of Commencement 25<sup>th</sup> September 1986  
 Premium position Half-yearly premium due September 2001 paid on 22.11.2001  
 Bonus vested after valuation on 31.3.2001 Rs.34000  
 Surrender value factor Duration 14 tears 22%-15 years 25% -16 years -30%
- III Calculate age nearer birthday, age last birthday & age next birthday based on following data.  
 Date of proposal : 14<sup>th</sup> July 2003  
 Date of Birth : 8<sup>th</sup> September 1964
- IV. Calculate the “ PREMIUM’ Income for the 2004-2005
- |   |           |
|---|-----------|
| Premium received on Life policies during the year | 40,00,000 |
| Re-insurance premium ( Paid)                      | 1,60,000  |
| Bonus in Reduction of Premium                     | 80,000    |
| Premium outstanding on 1.4.2004                   | 1,92,000  |
| Premium outstanding on 1.4.2005                   | 1,28,000  |

V Calculate the “PREMIUM” Income for the year 2004-2005

Total premium received	60,00,000
Re-Insurance Premium paid	4,60,000
Bonus in reduction of Premium	5,00,000
Outstanding Premiums on 1.4.2004	4,88,000
Outstanding Premiums on 1.4.2005	3,58,000

VI The Life Fund of ABC Life Assurance Company was Rs.87,08,000 as on 31<sup>st</sup> March, 2005. The Interim Bonus paid during the intervaluation period was Rs.1,48,000. The periodical actuarial valuation determined the Net Liability at Rs.74,25,000. Dividend for 2004-2005 still payable is Rs.50,000

The surplus brought forward from the pervious valuation was Rs.8,50,000. The actuary’s remuneration outstanding is Rs.10,000

The Directors of the Company proposed to carry forward Rs.9,31,000 and to divide the balance between the Shareholders and the Policy holders in the ratio of 1:10.

You are required to show:-

- a. The valuation of balance sheet
- b. The Net surplus for the valuation period and
- c. The Distribution of the surplus

VII The life assurance fund of Oriental Life Assurance Fund Co.Ltd. was Rs. 69,20,000 on 31<sup>st</sup> March, 2005. Its actuarial valuation on 31<sup>st</sup> March, 2005 disclosed a net liability of Rs.57,60,000. An Interim bonus of Rs.60,000 was paid to the policy-holders during the previous two years. It is now proposed to carry forward Rs.2,20,000 and to divide the balance between the policy-holders and the shareholders.

You are required to show:

- a. the valuation of balance sheet
- b. the net profit for the two years period and
- c. the distribution of the profits

VIII The Life Assurance Fund of a Company on 31-3-2005 was Rs.6 Crores. Its Net liability on that date was estimated to be Rs.5,70,00,000 by the Company’s Actuary.

The investments held by the company amounted to Rs.4,80,00,000 against which the invest reserve stood at Rs.7,50,000. The invests have to be written down by Rs.12,00,000. The company declared a Reversionary Bonus of Rs.60 per Rs.1000 with the option to policy holders of bonus in cash @ Rs.24 per Rs.1,000. Total value of policies in force was Rs.8 Crores.  $\frac{1}{4}$  of the policy holders (in value) decided to receive the bonus in cash

The company estimated that its liability of income tax would be Rs.4,80,000.

Draft the Journal entries to record the above

- IX Draft the Proforma of Revenue Account –Form A-RA of Life Insurance business
- X Draft the Proforma of Balance sheet - Form A-BS of Life Insurance business
- B]** Record **5**

**INSURANCE AND MARKETING COURSE**  
**MODEL QUESTION PAPER I YEAR PRACTICALS PAPER-III**  
**IT SKILLS FOR BANKING & FINANCIAL SERVICES**

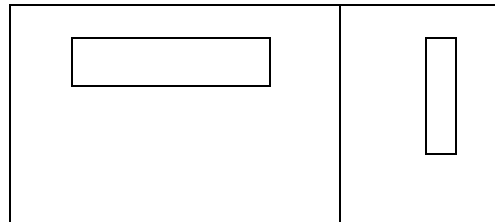
**Time: 3 Hours**

**Max. Marks. 50**

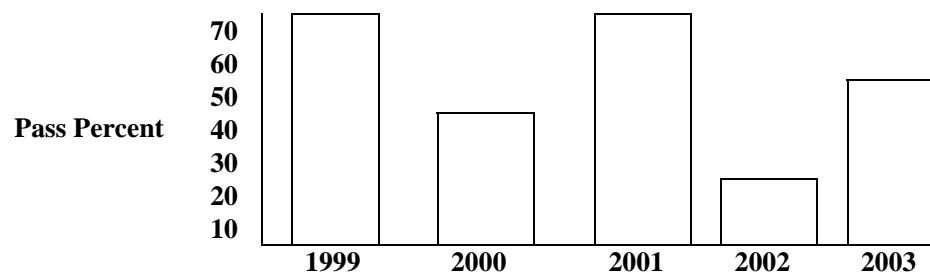
**A] Answer Any Nine Questions Each Question Carries 5 Marks.**

**9X5=45**

- 1 Design a paper ADD by using MS- Word
- 2 Prepare a presentation on your College which covers all the information by giving attractive Animation.
- 3 Create a employee salary statement Template which contains employee number, employee name, employee designation, basic, 10% DA, 15% HRA, 25% TA, other allowance 25% Total, 30% Income Tax Professional Tax 5 % and Gross. & Net
4. Create a Mail Merge for sending greetings to 10 Friends.
5. Enter data of 50 students. Filter the information on specific columns.
- 6 Draw the below diagram in word and flip in horizontally and vertically?



7. Show a beautiful presentation with 3 slides discussing about your class room with beautiful design.
8. Create your College timetable in MS-Word using inset table command.
9. Draw the following chart with given labels.



- 10 Insert a comment to the cells E7 and E13 & show the comment.
- 11 Set the timings for the two slides. For the first slide 15 seconds and for second slide 22 seconds.
- 12 Create a e-mail account on your College name.

**B] Record**

**5**

**INSURANCE AND MARKETING COURSE**  
**MODEL QUESTION PAPER IIYEAR THEORY PAPER-I**  
**GENERAL INSURANCE**

**TIME: 3 Hrs.**

**Max. Marks: 50**

**PART – A**

- I. Answer the following Questions** **10x2 =20**
1. What is General Insurance?
  2. What are the different types of General Insurance?
  3. What is Fire Insurance?
  4. What are the types of policies in fire insurance?
  5. What is Rating in General Insurance?
  6. What is claim?
  7. What is third party liability?
  8. What is burglary Insurance?
  9. What is shop keeper's insurance policy?
  10. What is Banker's blanket block policy

**PART –B**

- II Answer any five of the following** **5x6 = 30**
11. Explain the rules for cancellation of policy in fire insurance
  12. What is the procedure of claim when motor accident takes place?
  13. What are the various types of disablement?
  14. What is a Medi claim policy and explain various types of riders that are offered by various insurance companies?
  15. What are the requirements for taking overseas medical policy?
  16. What are the various fidelity guarantees?
  17. What is the role of TPA's in settlement of claims?
  18. What are the principles of General insurance and explain the basis of rate making in general Insurance?

**INSURANCE AND MARKETING COURSE**  
**MODEL QUESTION PAPER IIYEAR THEORY PAPER-II**

**MARKETING AND PUBLIC RELATIONS**

**TIME: 3 Hrs.**

**Max. Marks: 50**

**PART - A**

- 1. Answer the following** **10x2 = 20**
1. Define Marketing
  2. Define Public relations
  3. How insurance business is helpful for the development of country
  4. What is an Interview?
  5. What is an objection?
  6. What is an salesmanship?
  7. Explain the insurance business in abroad
  8. What is an service?
  9. What is an objection?
  10. What is rural Insurance?

**PART – B**

**Answer any Five of the following** **5x6 = 30**

11. Explain the various types of environment in insurance business
12. What are the basic marketing principles?
13. What is the procedure of pre approach and approach and handling of customer by the sales man /agent?
14. What are strategies for insurance marketing?
15. What is consumerism and various ethics?
16. Explain the selling process
17. Explain the procedure for building relationships with customers
18. Explain the need of quality in services

**INSURANCE AND MARKETING COURSE**  
**MODEL QUESTION PAPER IIYEAR THEORY PAPER-III**  
**RETAIL MARKETING**

**TIME: 3 HOURS**

**Max. Marks: 50**

**SECTION –A**

**ANSWER THE FOLLOWING QUESTIONS** **10X2 =20**

- 1 Who is an Retailer
- 2 What is tele marketing
- 3 What is e-commerce
- 4 What is sales promotion
- 5 What is event management
6. What is discount
- 7 What is grading & standardization
- 8 Define mall & super market
- 9 Explain the examples of print media
- 10 What is an delivery note

**SECTION – B**

**II ANSWER ANY FIVE OF THE FOLLOWING** **5x6 = 30**

- 1 What are the functions of marketing
- 2 What are the various types of retailers
- 3 Explain the procedure of stores layout & design
- 4 Explain the procedure of pricing & promotion of product
5. What are the types of inventory control
6. Explain the importance of packing and delivery in marketing of goods
- 7 What are the various types of social marketing

**INSURANCE AND MARKETING COURSE**  
**MODEL QUESTION PAPER IIYEAR PRACTICALS PAPER-I**

**GENERAL INSURANCE**

**TIME: 3 HOURS**

**Max. Marks. : 50**

- A] ANSWER ANY FOUR OF THE FOLLOWING      10X4=40**
1. List of the promotional methods adopted by General Insurance company to market General Insurance policies. 10
  2. List out the benefits and difficulties associated with crop insurance and cattle insurance etc. 10
  3. Under motor Insurance Explain problem parts which can be damaged in case of accident. Discuss the legalities involved in case of accident 10
  4. Explain the procedure involved and documents required in settlement of medi claim. 10
  5. Explain the fire and related hazards to industrial buildings and safety measures 10
- B] Viva + Record      5+5=10**



**INSURANCE AND MARKETING COURSE**  
**MODEL QUESTION PAPER IIYEAR PRACTICALS PAPER-III**

**RETAIL MARKETING**

**TIME: 3 HOURS**

**Max. Marks. : 50**

- A] ANSWER ANY FOUR OF THE FOLLOWING 10X4=40**
1. What are the different types of stores you have observed in your locality? Describe them and their procedure of maintenance 10
  2. Explain the procedure of Network marketing 10
  3. Explain the factors of consideration and consumer behaviour while selecting a product to purchase 10
  4. Briefly explain the process of goods packing, branding, labeling and arranging for sale in a Super bazaar with live examples 10
  5. Draft a event management of your college day celebrations 10
- B] Viva + Record 5+5=10**

**LIST OF EQUIPMENT REQUIRED FOR INSURANCE & MARKETING COURSE****A) i) EQUIPMENT SPECIFICATIONS Quantity**

1.	Overhead Projector	01
2.	Slide Projector	01
3.	Transparencies	50
4.	DVD'S	
5.	Slides/Stains strips	
6.	Filing cabinets	
7.	Screen for using projectors	1
8.	Calculators	2
9.	Weighing machines with access	1
10.	Computer with accessories	1
11.	Colour T.V., D.V.D	1

**ii) MATERIALS :**

1. All stationary items
2. Rubber stamps (Receipt, payments etc.)
3. Various printed cyclostyled material, proposals, policy documents, endorsement renewal notices etc.,
4. Book ledgers, accounts ledgers, claims registers, and other related books
5. Insurance manuals ( Procedural and claims) and personal manual
6. Specimen copies of issued documents
7. Road and Rail maps.

**B) ON THE JOB TRAINING SITES :**

- a) Any branch Office of LIC – GIC – etc.
- b) Any branch Office of Nationalized General Insurance corporation or Private Insurance company Offices.
- c) A.P. State Life Insurance department at Hyderabad
- d) E.S.I. Office
- e) Office of any Insurance agent / consultant recognized by LIC/GIC – any Private Life Insurance with record keeping.

**C) ASSIGNMENT FOR ON THE JOB TRAINING AND EVALUATION :**

Each task listed below may be considered for awarding one mark after successful completion of the task

**INSURANCE & MARKETING :****1. Typist – cum – Assistant****5**

- 1 Taking dictation or from manuscripts, Typing on manual or electronic typewriter or personal computer of the following.
  - a) All Official letters
  - b) Circulars
  - c) Memorandums, Notices
  - d) Any other job assigned by the Officer.

- II. PUBLIC RELATION ASSISTANT –CUM-RECEPTIONIST : 5**
- a) Receiving customers with due courtesy and preparing a short note of his /her requirements.
  - b) Referring to concerned person for the related work with note of his /her requirements.
  - c) Final reply to customer with necessary follow up
- III OFFICE SERVICES : 10**
- a) Office up -keeps neatness and maintenance of all constituents of Office, generator etc. payment of electrical and telephone bills.
  - b) Office security, Iron safe, Fire extinguishers, keeping records in proper lock and key and safe position.
  - c) Inward Register – Entries and maintenance.
  - d) Out ward and inter departmental movement register with proper followup.
  - e) Sufficient provision of furniture etc., according to the needs of the staff and field officials.
  - f) Procuring, supply control and maintenance of various form, stationery and printing, etc.
- IV PERSONNEL AND INDUSTRIAL RELATIONS ASSISTANT : 5**
- a) Maintenance of personnel records of all employees including field staff
  - b) Maintenance and control of attendance register leave records, issuing necessary orders.
  - c) Attending to salary related jobs such as preparation of pay rolls, grant of normal and additional increments etc.
  - d) Miscellaneous, Disciplinary rules when ever necessary, daily wages, statutory such as shops and establishments act provision.
- V MARKETING AND SALES : 5**
- a) Planning – Targets for the, month, fortnight review meetings, competitions.
  - b) Preparation of N>B>Statistics and motivation letters to field staff and preparation of statistics to all departments.
  - c) Agency matters, recruitment, appointment, training etc.
  - d) Development Officers, appraisals, performance reviews, motivation letters.
  - e) Publicity, Boarding, wall painting posters, handouts, public relations, customers meet.
- VI NEW BUSINESS : 5**
- a) Receiving proposals – scrutiny – following for requirements reference to Officer necessary
  - b) New business completion procedure, including relevant records giving policy number
  - c) Preparation of policy documents, affixing policy stamps and dispatch
  - d) Preparation and sending completion advices to
    - i) Data processing department
    - ii) Commission Department, marketing department
    - iii) Advances to paying authorities on SS Policy
    - iv) Transfer of policy files to the concerned branches where ever applicable
  - e) Life insurance under writing, Medical, Non-medical, preparation of preliminary notes, decision and coding.

- VII CASHIER** **5**
- a) Receipts of deposits / premiums/Miscellaneous
  - b) Payments to staff / field personnel/customer control
  - c) Safe custody of cash/Cheques /Collecting from banks and remittances to bank
  - d) Maintenance of petty cash and stamp accounting.

**VIII CUSTOMER SERVICES :** **10**

- a) Deposits, Adjustments, refund, maintenance of records.
  - b) Age admission /Nomination/Assignment/Alteration.
  - c) Loans/Loan interest /recovery procedure for closer action
  - d) Revivals, requirements, revivals action.
  - e) Lapsed procedure paid up values.
  - f) Specimen copies of issued documents
  - g) Road and rail maps.
- D) QUALIFICATIONS FOR THE TEACHING STAFF OF INSURANCE & MARKETING COURSE**
1. Post – graduate in Commerce /Business Management with Insurance as a subject of i.e. M.Com/MBA with II Class or more with not less than 50 % Marks.
  2. Graduate in commerce ( 1<sup>st</sup> class ) /Business management ( 1<sup>st</sup> ) with Insurance as a specialization of study with at least an associate member level diploma form the Insurance Institute of India.  
Or
  3. Fellow of Insurance Institutes of India  
Or
  4. Associate of Insurance Institute of India with at least 5 years experience in any Office L.I.C. or G.I.C  
Part-time/Guest/Honorary/Extension lecturers
  5. Any retired or working LIC/ other Insurance Executive

**E) LIST OF REFERENCE BOOKS**

- | <b>No.</b> | <b>Title</b>                                    |
|------------|---|
| 1.         | Principles of Life Assurance                    |
| 2.         | Practice of Life Assurance                      |
| 3.         | Principles of General Insurance                 |
| 4.         | Practice of General Insurance                   |
| 5.         | Elements of modern commerce                     |
| 6.         | Modern application of life assurance            |
| 7.         | General fire hazards                            |
| 8.         | Fire Insurance claims                           |
| 9.         | Marine Insurance claims                         |
| 10.        | Agricultural Insurance                          |
| 11.        | Motor Insurance                                 |
| 12.        | Personal accidents and sickness Insurance       |
| 13.        | Group Insurance and retirement benefits scheme. |
| 14.        | Hand book of examination and benefits schemes   |

- 15 Insurance ACT 1938 X  
Insurance Rules 1939 X Central Government Publications.  
1-14 are Published by  
Insurance Institute of India,  
P.O.Box No. 1507,  
Universal Insurance Building,  
6<sup>th</sup> floor,  
S.I.R.P.M. Road,  
MUMBAI – 400 001
- 16 SALES EXPERIENCE :  
Published by L.I.C. of INDIA  
South Central Zone, Hyderabad.
- 17 Marketing in India by S. Neelamegham Published by Vikas/ Publishing  
House Pvt. Ltd, New Delhi.
18. Rajan Saxena - Marketing Management in Indian Context, TMH  
Publications
19. Salesmanship, Sales Management and Advertising by M.Satynaranayan,  
Published by Vara and Co., Publisher Pvt. Ltd. Mumbai.
20. Principles of Marketing and Salesmanship by J.C. Sinha, Published by  
S.Chand and Co. Delhi.
- 21 Salesmanship and publicity by J.S.K. Patel Published by Sultan Chand and  
Sons, Delhi.
22. Marketing Management by Ramaswamy and Namakumari Published by  
Mc. Milan India, 1995
23. Product Management by Ramanath Majumdar, Prentice Hall Publications.
24. Fields Sales Management by S. Ramchandran Published by Allied  
Publishers Pvt. Ltd.
25. Salesmanship and publicity by Rustom S. Davar, Published by Progressive  
corporation Pvt. Ltd. Mumbai.
26. Marketing and Salesmanship by S.A. Sherekar Published by Himalaya  
publishing House.
27. Computer Fundamentals ( in Telugu) By Mr. Yesu Babu
28. Fundamental Computer by E. Balaguru Swamy
29. Peter Noton's Introduction to Computers