



# Newsletter

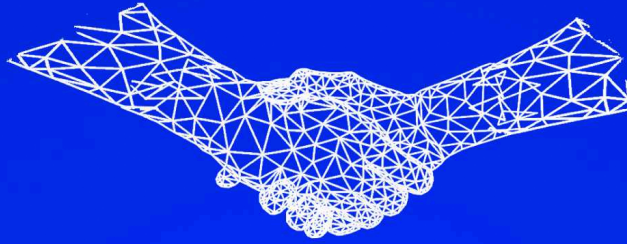
## January 2026



# Partner Success Stories

Your Monthly Dose of PBP Insights & Inspiration





## A Special Message



**Shivank Kapur**  
BU Head - Commercial Lines

As we step into 2026, the **January edition of PBP Connect** brings you the latest updates, insights, and opportunities to kick-start the year with PBPartners. This edition highlights **Samvaad 2.0**, an industry-first, **CXO-led initiative** key highlights that brings leadership closer to partners and teams through real, honest conversations beyond boardrooms.

We also celebrated the **launch of our Bhopal Experience Centre**, marking an important step in expanding our footprint and enabling a smoother, more efficient insurance-selling experience for our partners.

Additionally, we showcase the **successful Mass Mobilization & Market Activation campaign in Nagpur**, reaffirming our commitment to taking insurance to Bharat. Rounding off the edition is the **launch of the new program cycle of PBP One Clubs**, featuring exciting destinations and power-packed JFM Boosters to accelerate the growth journey of our agent partners. Here's to a year of collaboration, momentum, and shared success—let's make **2026 truly impactful, together.**

# Samvaad 2.0

Dialogue Driving Change

After the resounding success of its first edition, **Samvaad 2.0 returns** as an industry-first, CXO-led initiative—bringing leadership closer to partners and employees through real, honest conversations beyond boardrooms.

Led by our **Chief Business Officer, Mr. Dhruv Sarin**, along with the **PBPartners' leadership team members Mr. Neeraj Adhana (NSH, Health & Life Insurance), Mr. Rahul Mishra (NSH, Life & Health Insurance), and Mr. Amit Bhadoria (NSH, Motor Insurance)**.

Samvaad 2.0 so far **organised across 7 cities this January—Hyderabad, Warangal, Jaipur, Agra, Lucknow, Bhopal, and Indore**—engaging top partners and employees in meaningful, insight-driven discussions.

**Built on three strong pillars—Parivartan, Samvaad, and Sankalp**—the initiative focuses on understanding challenges, deepening trust, and strengthening the relationships that power our ecosystem. **Samvaad 2.0** is more than a dialogue. It's a commitment to partnership, trust, and collective growth.



AGRA



JAIPUR



LUCKNOW



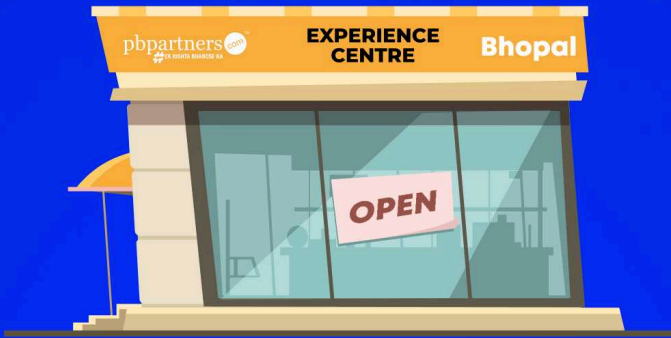
BHOPAL



WARANGAL



INDORE



## Bhopal Experience Centre Launch

We're excited to announce the **launch of our Bhopal Experience Centre**—a dedicated space designed to bring partners closer to new opportunities, innovation, and sustainable growth. The centre has been thoughtfully created to enable our agent partners in Bhopal and nearby regions to engage more effectively with their clients, access hands-on business support, and gain deeper insights into the latest products, tools, and processes offered by PBPartners—**empowering them to build a successful insurance business.**

The Experience Centre was formally **inaugurated by our Chief Business Officer, Mr. Dhruv Sarin, along with the senior leadership team members - Mr. Amit Bhadoria (NSH, Motor Insurance), Mr. Neeraj Adhana (NSH, Health & Life Insurance) & Mr. Parmender Singh (Head, Brand & Marketing).**

This launch reaffirms PBPartners' commitment to **strengthening partner growth** and delivering robust on-ground support in insurance selling.





# Mass Mobilization & Market Activation in Nagpur Kaun Banega PBPartner?

PBPartners successfully conducted a **Mass Mobilization & Market Activation in Nagpur**, reinforcing our commitment to take insurance closer to the people of Bharat. Through Kaun Banega PBPartner? We engaged directly with communities to build insurance awareness at the grassroots level.

From **nukkad natak** to **sessions with SHGs, RWAs, college students, and homemakers**, along with on-ground awareness counters, the focus remained on education, trust-building, and simplifying insurance. The initiative followed a community-led approach, introducing a **zero-investment, partner-led model** that encourages participation through understanding and confidence. Nagpur marks the beginning of this journey. PBPartners will continue taking this initiative across tier 2 and tier 3 cities, **creating micro-entrepreneurs while taking insurance to every corner of Bharat.**



SHG SESSION



RWA SESSION



HOMEMAKER SESSION



CANTER ACTIVITY



COLLEGE STUDENTS SESSION



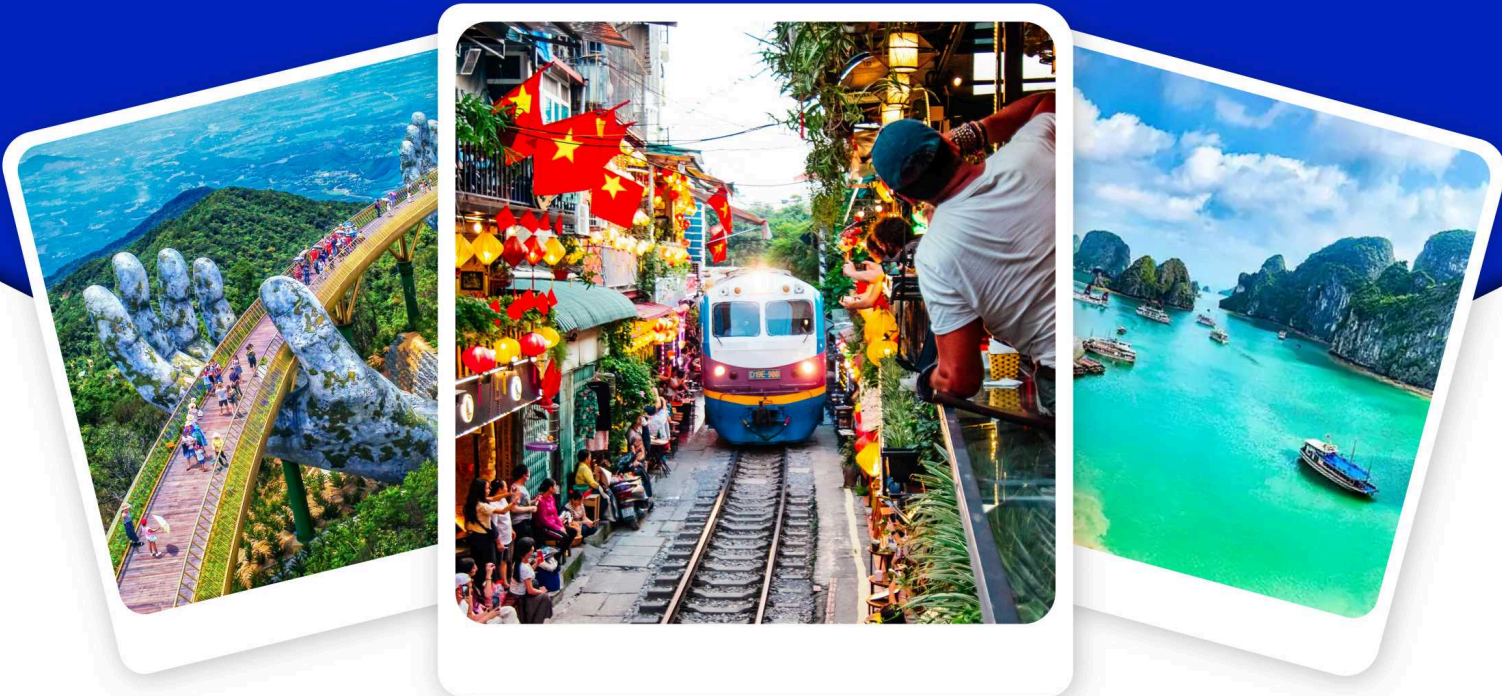
NUKKAD NATAK

# PBP MAHASANGRAM DHURANDHARO KI JUNG

JFM 2026

PBPartners has proudly launched its JFM 2026 Contest—JFM Mahasangram: **Dhurandharo ki Jung**, a special and exciting contest only for the **PBPartners Sales Team**. This contest is all about hard work, smart planning, and consistent performance. It brings together **four strong teams—Motor Ke Dhurandhar, Life Ke Dhurandhar, Health Ke Dhurandhar, and CL Ke Dhurandhar**—each focused on doing their best in their respective insurance categories. With tough competition, attractive rewards, and the chance to be **celebrated on a grand international stage in Vietnam**, JFM 2026 is designed to motivate every sales member to give their best, perform better each day, and emerge as a true **Dhurandhar**.

PARTICIPATE &  
**UNLOCK YOUR**  
**TRIP TO VIETNAM**





The Institute Of Chartered Accountants Of India



WOFA 2.0  
WORLD FORUM OF ACCOUNTANTS  
2026 | 30<sup>th</sup> JAN to 1<sup>st</sup> FEB | GREATER NOIDA INDIA

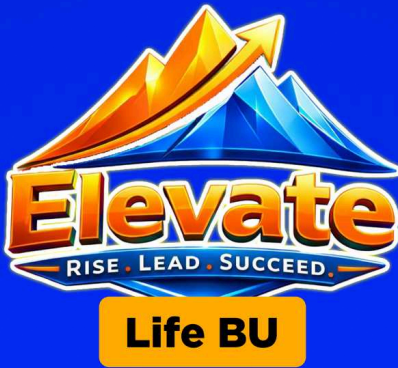
Nation Building to Global Collaboration: Strengthening Trust, Enabling Growth

Life BU

# Conversations that Convert: PBPartners Connects with CAs at WOFA 2.0

PBPartners proudly participated as an exhibitor at WOFA 2.0, where the focus was on meaningful, one-to-one conversations with Chartered Accountants (CAs) to introduce them to the vast potential of becoming a Life insurance agent partner at PBPartners. Highlighting how their financial expertise, client trust, and advisory mindset make them ideal partners for insurance distribution. Through this participation, PBPartners reaffirmed its commitment to empowering financial professionals by opening new avenues for growth, diversification, and long-term income stability.





# Empowering Excellence in the Life Insurance BU

Elevate is a powerful two-day Life Insurance workshop hosted at our Head Office in Gurugram on 6th & 7th January, bringing together our top Life Insurance partners from across India for a shared journey of growth and excellence.

The workshop featured engaging sessions with our Chief Business Officer, Mr. Dhruv Sarin, and senior leaders including Mr. Aryan Singh (BU Head, Life Insurance), Mr. Rahul Mishra (NSH, Life & Health Insurance), Mr. Gagan Khurana (Head, Training & Development), and Mr. Parmender Singh (Head, Brand & Marketing), who shared valuable insights and strategies for success. The hands-on training, led by Mr. Atul Tiwari, Senior Manager, Learning & Development (Life Insurance), empowered our partners with practical skills and boosted their confidence to take charge and lead in the market.

Aligned with our mission of making insurance accessible, inclusive, and impactful across Bharat, this workshop was a powerful step toward fostering a more confident and capable partner network.





## More Performance. More Recognition. More Rewards.

With **PBP One Clubs CY 2026**, every milestone you achieve brings you closer to elite status. Designed to **honour your consistency and excellence**, this exclusive loyalty initiative transforms net weighted premium achievements into **global travel experiences**, premium benefits, and **prestigious recognitions** that define true success.

**NEWLY LAUNCHED**

## QUARTERLY CLUBS' SLABS



**3 Lakhs\***

Net Weighted Premium



**5.5 Lakhs\***

Net Weighted Premium



**12 Lakhs\***

Net Weighted Premium

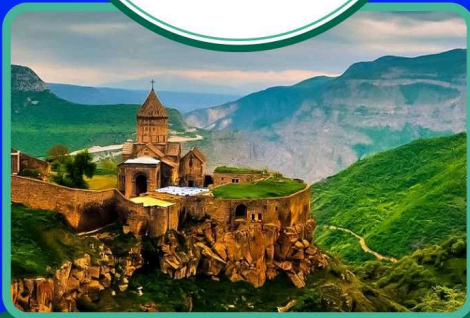
**Quarterly Club slabs will be revised every quarter. Valid only for JFM**

Visuals here are for representation purpose only | \*T&Cs applied

# Annual Clubs' Slabs



**DUBAI**  
75Lakh\*(NWP)  
+  
1 Time  
Crown Qualified



**ARMENIA**  
1.5Crore\*(NWP)  
+  
2 Times  
Crown Qualified



**PARIS**  
2.5Crore\*(NWP)  
+  
3 Times  
Crown Qualified



Visuals here are for representation purpose only | \*T&Cs applied

# JFM Booster Family Pass

Win 2 Tickets to your Dream Destination

**HIT 50%** Any Annual Club Target



**DUBAI**  
75L\* (NWP)



**ARMENIA**  
1.5Cr\* (NWP)



**PARIS**  
2.5Cr\* (NWP)

To know more, Reach Out to your RM

Family Pass is valid only on achieving the Overall Annual slab target

Visuals here are for representation purpose only | \*T&Cs applied



Eligibility: Quarterly Clubs Qualification

Lucky Draw Criteria 1

Lottery Tickets Criteria	No. of Lottery Tickets
<p>In this Calendar year</p> <p>2 Times      Any of 2 other Clubs</p>	<p>1X</p>
<p>In this Calendar year</p> <p>3 Times      Any of 1 other Club</p>	<p>2X</p>
<p>In this Calendar year</p> <p>4 Times</p>	<p>3X</p>

Lucky Draw Criteria 2

Lottery Tickets Criteria	No. of Lottery Tickets
<p>In this Calendar year</p> <p>3 Times      1 Time</p>	<p>1X</p>
<p>In this Calendar year</p> <p>4 Times</p>	<p>1X</p>

Visuals here are for representation purpose only | \*T&Cs applied

# SERVICE INITIATIVE

## New and Improved Motor Offline Quote Request Flow

PBPartners is proud to introduce the **new and improved Motor Offline Quote Request Flow**, our **Service Team-led initiative** designed to simplify processes, minimize manual effort, and significantly accelerate quote generation for our partners.

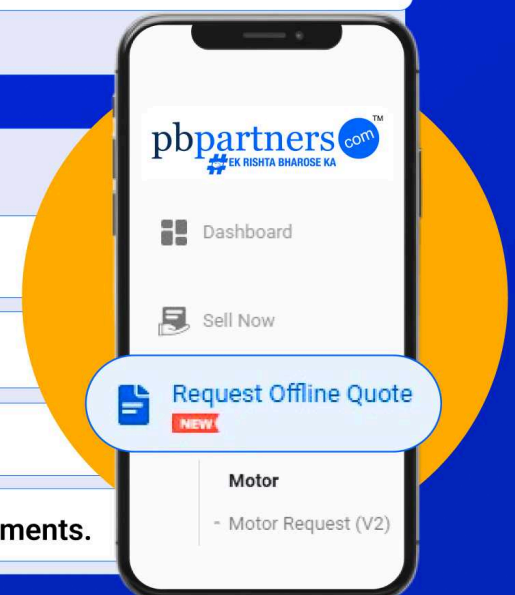
With this enhanced flow, partners can now initiate a quote request by simply uploading the **Previous Year Policy (PYP)** or the **Registration Certificate (RC)**—eliminating the need for lengthy manual data entry, unstructured remarks, and repeated follow-ups.

### Key Enhancements

- Automatic data pre-fill enabled through advanced OCR and API integrations.
- Minimal manual inputs, limited to essential selections such as policy type, add-ons, NCB, and IDV.
- Structured and standardised data capture for improved accuracy, tracking, and processing efficiency.

### Key Benefits

- Faster quote request creation.
- Reduced errors, inconsistencies, and follow-up queries.
- Quicker turnaround time for quote processing.
- A scalable foundation supporting future automation and system enhancements.



*This enhancement is more than a feature update—it is a strategic step towards faster execution, higher efficiency, and seamless partner experience.*

# Partner Success STORY



**Rajendra Bhagat**  
Assam

“

**A Journey of Growth and Transformation**

My journey with PBPartners began 3 years ago, and it has truly reshaped my professional life.

**A Powerful Platform That Drives Success**

PBPartners stands out with its strong platform, offering a wide product range, real-time digital tools, and a seamless system that simplifies daily work and enhances productivity.

**Support of PBP Mitra**

PBP Mitra has played a crucial role in my journey, acting as a dependable support system for day-to-day guidance, quick resolutions, and timely assistance. With PBP Mitra by my side, I am able to focus better on business growth while staying confident that support is always just a call away.

”

# Partner Success STORY



## Akhtar Israr Hussain Maharashtra

“

### The Start of a New Chapter

Joining PBPartners marked a defining moment in my journey as a health insurance agent. It gave me not just a platform, but a clear path to grow with confidence.

### A Platform that Works With Me

PBPartners' platform made my work simpler and more effective. From a wide range of products to real-time digital tools, everything I need to manage my business efficiently is available in one place.

### Support that Never Lets you Feel Alone

My relationship manager has been a constant pillar of support. Whether it was guidance, quick problem-solving, or timely assistance, help was always just a call away—giving me the confidence to focus on growth.

### Turning Opportunities into Achievements

With the help of the **PBPartners' mobile app and its fast quote system**, I was able to close a major health insurance deal. The speed, product variety, and ease of use helped me win my client's trust and turn opportunity into success.

”

# Partner Success STORY



## DG Prasanna Ranade Karnataka

“

### From Growth to Breakthrough Success

Since joining PBPartners, my income hasn't just increased—it has grown steadily and meaningfully, giving me the financial stability and confidence to aim higher and achieve more.

### PBPartners- Powerful Ecosystem

What sets PBPartners apart is its powerful ecosystem—an expansive product portfolio, a cutting-edge digital platform, and strong marketing support. Together, these tools enable me to work smarter, deliver greater value to my clients, and make my work not just successful, but truly impactful.

### A Journey that Redefined My Career

My partnership with PBPartners over the last 2 years has been truly transformational, reshaping the way I grow, perform, and succeed in my career.

”

# Partner Success STORY



**Bikash Das**  
Assam

“

**Building a Scalable Insurance Business**

My association with PBPartners has been instrumental in building a strong and sustainable life insurance business.

**Consistent Revenue Growth and Financial Stability**

Since partnering with PBPartners, my income has grown steadily, strengthening my financial stability and long-term business confidence.

**A Platform Built for Performance**

With a diverse life insurance product portfolio and a seamless digital platform, PBPartners enables me to serve clients efficiently, close business faster, and maintain consistent momentum. The simplified processes and dependable support allow me to focus on growth, helping me build the kind of business I once only envisioned.

”

# Partner Success STORY



**Anil Kumar Gupta**  
Rajasthan

“

**Adding a Powerful Revenue Stream to my Practice**

PBPartners enabled me to add one more structured and scalable revenue stream alongside my core CA practice. This additional income source has reduced dependency on a single stream and strengthened my long-term financial confidence.

**A Technology-Driven Platform for Scalable Growth**

With its tech-enabled platform, instant payout system, and strong insurer tie-ups, PBPartners has made it easy to grow my insurance business efficiently and sustainably.

**A Smooth Transition into Insurance Advisory**

PBPartners made it easy for me, as a CA, to become an insurance agent. From onboarding and certification to training and compliance support, everything was structured and simple, allowing me to add insurance advisory to my existing financial practice without disruption.

”





## Awards & Recognitions | January Highlights

January brings proud moments for PBPartners. We are thrilled to announce that we have been **honored with two prestigious industry awards**, marking a powerful start to the year. PBPartners received the **PBP Mitra Award for Best Service Excellence**, recognizing our unwavering commitment to exceptional service and seamless partner support.

Adding to this milestone, we also won the **Best Marketing Communications (B2B) Award**, celebrating our leadership and excellence in branding and marketing.



**PBP Mitra Award  
Best Service Excellence**



**Best Marketing Communications  
(B2B) Award**

# Know *your* Leader



**Shwetabh Walter**  
**Head - Product**  
**PBPartners**

Shwetabh Walter plays a key role in shaping product thinking and execution at PBPartners, working closely with teams across product, business, sales and operations. With a background in product strategy, analytics, and system design, he works across teams to translate user needs into clear, executable solutions. His work brings together partner enablement, performance automation, and data-driven thinking to turn complexity into clarity for teams. Shwetabh continues to contribute to building products that strengthen the partner ecosystem and support PBPartners' long-term vision.

# Rapid Fire Round

## with Shwetab Walter

*A fun rapid-fire that goes beyond work and straight into personality. Here's what unfolded...*



**Q Speed or perfection — what wins in tech?**

“Speed with taste. Move fast enough to learn, but slow down where users feel pain or trust is at stake.”

**Q How do you keep your team motivated under tight deadlines?**

“By anchoring urgency to meaning—clear outcomes, visible wins, and protecting the team from unnecessary noise.”

**Q Your secret talent no one at the office knows?**

“I’m unusually good at spotting second-order effects—what will break or behave differently after something ships.”

**Q One app you can’t live without?**

“WhatsApp—closest to the field and helps with real-time decisions.”

**Q If not in tech, what career would you choose?**

“Advertising—creativity guided by outcomes.”

**Q What defines a “great product” for you in one line?**

“A product that quietly changes user behaviour without demanding attention.”

**Q One leadership quality you value the most?**

“Clarity—execution is a byproduct of well-framed problems; it turns effort into progress.”

**Q One word your team would use to describe you?**

“Empowering.”

**Q If you had the chance to swap roles with someone at PBPartners, who would it be and why?**

“Sales—the fastest feedback loop for product-market fit.”

pbp CONNECT  
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2026



## Join Our Social Circle



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