QUEST
Professional Center

PROFESSIONAL TRAINING COURSE

Course No. 1920

Customer Experience Management in Insurance Training Course

INSURANCE CUSTOMER EXPERIENCE & SERVICE
INSURANCE & RISK MANAGEMENT

DURATION
5 Days

DELIVERY
Classroom

Course Overview

The Customer Experience Management in Insurance Training Course provides a strategic and practical framework for designing, managing, measuring, and continuously improving customer experience across the insurance lifecycle. The course examines how insurance organizations can place customer experience at the center of business strategy, operational performance, service delivery, and long-term customer value.

Participants will explore the complete customer experience across product discovery, quotation, acquisition, onboarding, underwriting, policy administration, claims, renewals, payments, complaints, and customer service. The program focuses on understanding customer expectations, identifying critical moments, reducing friction, and creating consistent and meaningful experiences across multiple customer touchpoints.

The course also addresses customer experience measurement, customer feedback, journey analytics, segmentation, personalization, service quality, complaint management, digital experience, omnichannel management, and customer experience performance indicators. Participants will learn how to transform customer insights into practical improvements that support satisfaction, loyalty, retention, operational efficiency, and profitability.

Particular emphasis is placed on customer experience governance, cross-functional ownership, data-driven decision-making, continuous improvement, and strategic alignment. Through insurance case studies, practical exercises, role plays, and workshops, participants will develop an integrated customer experience management framework and an actionable roadmap for implementation.

Objectives

- By the end of this course, participants will be able to:
- Analyze the strategic importance of customer experience management in insurance.
- Identify the key drivers of customer satisfaction, loyalty, retention, and value.
- Evaluate customer journeys across the insurance lifecycle.
- Identify critical customer touchpoints, pain points, and sources of friction.
- Design customer-centric experiences across insurance products and services.

- Apply customer feedback and customer insights to improve service delivery.
- Develop customer experience performance indicators and measurement frameworks.
- Analyze customer experience data to identify trends, gaps, and improvement opportunities.
- Apply segmentation and personalization approaches to enhance customer engagement.
- Improve complaint handling, service recovery, and relationship management.
- Evaluate digital and omnichannel customer experiences.
- Strengthen cross-functional ownership and governance of customer experience.
- Align customer experience initiatives with operational, financial, and strategic objectives.
- Prioritize customer experience improvement initiatives according to business impact.
- Develop an actionable customer experience management strategy for an insurance organization.

Who Should Attend

This course is designed for insurance executives, senior managers, department heads, and decision makers responsible for customer experience, service quality, business performance, digital transformation, customer relationships, and strategic development. It is particularly relevant to professionals working in customer experience, customer service, claims, underwriting, policy administration, sales, distribution, marketing, operations, and digital insurance.

The program is also suitable for specialists in customer insights, analytics, quality management, process improvement, product management, relationship management, innovation, and strategic planning who contribute to customer experience initiatives.

The course is especially valuable for insurance organizations seeking to establish a customer-centric operating model, improve customer satisfaction and loyalty, reduce friction and complaints, strengthen retention, and connect customer experience with sustainable business performance.

Learning Outcomes

- Upon successful completion of the course, participants will be able to:
- Develop a comprehensive customer experience management framework for an insurance organization.
- Map and analyze customer journeys across the insurance lifecycle.

- Identify critical touchpoints, pain points, and customer experience gaps.
- Understand the key factors influencing customer satisfaction and loyalty.
- Use customer feedback, complaints, surveys, and behavioral data to generate customer insights.
- Develop meaningful customer experience performance indicators.
- Analyze customer experience trends and identify improvement priorities.
- Apply customer segmentation and personalization to improve engagement.
- Improve customer service and service recovery processes.
- Strengthen digital and omnichannel customer experiences.
- Establish clear ownership and governance for customer experience.
- Connect customer experience initiatives with operational and financial performance.
- Prioritize improvement initiatives based on customer and business value.
- Establish continuous customer experience improvement mechanisms.
- Develop an implementation roadmap for customer experience management.
- Support a sustainable customer-centric culture across the organization.

Course Outline

DAY 01

Foundations of Customer Experience Management in Insurance

- Understanding customer experience and its strategic importance in insurance.
- Customer experience versus customer service and customer satisfaction.
- Key drivers of customer expectations, trust, loyalty, and retention.
- The insurance customer lifecycle and experience ecosystem.
- Identifying critical moments and customer touchpoints.
- Understanding customer needs, expectations, emotions, and behaviors.
- Connecting customer experience with profitability and long-term customer value.
- Building a customer-centric organizational culture.

DAY 01 — CONTINUED

> **PRACTICAL APPLICATION**
>
> Analyze the customer experience lifecycle for a selected insurance product and identify the most influential customer touchpoints.

DAY 02

Customer Journey Management and Experience Design

- Principles and methodologies of customer journey mapping.
- Mapping customer journeys from acquisition through renewal.
- Analyzing customer interactions across underwriting, policy servicing, claims, and customer support.
- Identifying customer pain points, friction, delays, and process complexity.
- Analyzing moments of truth and their impact on customer perception.
- Designing customer-centric insurance processes and services.
- Redesigning critical customer touchpoints.
- Aligning internal processes with customer expectations.
- Creating future-state customer journeys.

> **PRACTICAL APPLICATION**
>
> Develop and redesign a customer journey for a selected insurance product, identifying current gaps and the desired future experience.

DAY 03

Customer Insights, Measurement and Experience Analytics

- Sources of customer experience data and customer feedback.
- Analyzing surveys, complaints, reviews, customer interactions, and behavioral data.
- Customer segmentation and experience-based profiling.
- Identifying satisfaction and dissatisfaction drivers.
- Measuring customer effort, satisfaction, loyalty, and retention.
- Developing customer experience performance indicators.

DAY 03 — CONTINUED

- Building customer experience dashboards and management reports.
- Using analytics to identify trends, gaps, and emerging customer needs.
- Translating customer insights into improvement initiatives.

> **PRACTICAL APPLICATION**
> Develop a customer experience measurement framework and dashboard for an insurance organization.

DAY 04

Digital, Omnichannel and Personalized Customer Experience

- Evolution of customer experience in digital insurance.
- Managing customer experience across digital and traditional channels.
- Websites, mobile applications, customer portals, contact centers, branches, and distribution channels.
- Designing seamless omnichannel customer journeys.
- Digital self-service and customer convenience.
- Personalizing customer interactions and communications.
- Using customer data and analytics to support personalization.
- Artificial intelligence and automation in customer experience.
- Managing digital friction, accessibility, privacy, and security.
- Balancing digital efficiency with human interaction.

> **PRACTICAL APPLICATION**
> Design an improved omnichannel customer experience for a selected insurance journey.

DAY 05

Customer Experience Governance, Performance and Implementation

- Establishing customer experience governance and accountability.
- Defining ownership across departments and customer journey stages.

DAY 05 — CONTINUED

- Linking customer experience indicators with operational and financial performance.
- Managing customer experience improvement portfolios.
- Prioritizing initiatives according to customer value and business impact.
- Establishing continuous feedback and improvement mechanisms.
- Managing customer experience risks and service quality.
- Building executive reporting and customer experience dashboards.
- Embedding customer experience into strategic planning and decision-making.
- Building a sustainable customer-centric operating model.
- Developing an implementation roadmap and change management approach.

FINAL WORKSHOP

Develop an integrated customer experience management strategy for an insurance organization, including customer journeys, critical touchpoints, customer insights, performance indicators, digital and omnichannel initiatives, governance, improvement priorities, and an implementation roadmap.

Register or Request More Information

Course page: https://quest-training.com/courses/customer-experience-management-in-insurance-training-course
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