

Course No. 1918

Customer Journey Mapping for Insurance Companies Training Course

INSURANCE CUSTOMER EXPERIENCE & SERVICE
INSURANCE & RISK MANAGEMENT

DURATION

5 Days

DELIVERY

Classroom



Course Overview

The Customer Journey Mapping for Insurance Companies Training Course provides a strategic and practical framework for understanding the customer experience across every stage of the insurance relationship. The course focuses on identifying customer touchpoints, pain points, friction, delays, and service gaps, and transforming these insights into actionable opportunities to improve insurance products, services, processes, and customer experience.

Participants will learn how to map the customer journey from initial awareness and product research through quotation, purchase, onboarding, policy administration, servicing, claims, renewal, and relationship continuation or termination. The course emphasizes understanding customer needs, expectations, emotions, motivations, and challenges at each stage of the journey.

The program also addresses the analysis of customer journeys across digital and traditional channels, including websites, mobile applications, contact centers, branches, intermediaries, and other distribution channels. Participants will learn how to connect customer journey insights with operational performance, service quality, customer satisfaction, loyalty, retention, and business outcomes.

Through practical exercises, insurance case studies, and applied workshops, participants will develop comprehensive customer journey maps, identify priority improvement areas, redesign critical customer interactions, and create practical initiatives for simplifying processes, reducing friction, and improving customer experience.

Objectives

- By the end of this course, participants will be able to:
- Analyze the role of customer journey mapping in improving insurance customer experience.
- Identify the key stages of the insurance customer lifecycle.
- Design comprehensive customer journey maps across insurance products and services.
- Identify major customer touchpoints throughout the insurance relationship.
- Analyze customer needs, expectations, motivations, and emotions at each stage.
- Identify customer pain points, friction, delays, and service barriers.

- Analyze the root causes of customer journey failures and service gaps.
- Connect customer journey insights with operational and customer experience indicators.
- Evaluate consistency across digital and traditional customer channels.
- Use customer feedback, complaints, and operational data to improve journey maps.
- Identify opportunities to simplify insurance processes and improve services.
- Prioritize customer journey improvement initiatives according to business and customer impact.
- Develop performance indicators for measuring customer journey effectiveness.
- Strengthen cross-functional collaboration around customer journey management.
- Develop an actionable roadmap for improving customer journeys within insurance organizations.

Who Should Attend

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

The program is also suitable for specialists working in process improvement, customer analytics, product management, digital insurance, innovation, quality management, and strategic planning who are involved in designing or improving customer experiences and insurance services.

The course is especially valuable for insurance organizations seeking to gain a holistic understanding of customer experiences, reduce customer friction, simplify processes, improve service quality, and strengthen customer satisfaction, loyalty, and retention.

Learning Outcomes

- Upon successful completion of the course, participants will be able to:
- Develop professional customer journey maps for different insurance products and services.
- Analyze customer journeys from the customer's perspective rather than solely from the internal process perspective.
- Identify customer touchpoints and interactions throughout the insurance lifecycle.

- Document customer needs, expectations, emotions, and challenges at each journey stage.
- Identify pain points, friction, delays, and process complexity.
- Analyze the root causes of customer experience problems.
- Connect customer journey issues with operational performance and service indicators.
- Analyze digital and omnichannel customer journeys and identify integration gaps.
- Use customer feedback, complaints, and operational data to improve journey maps.
- Identify opportunities to improve insurance products, services, and processes based on customer needs.
- Develop performance indicators for measuring customer journey effectiveness.
- Prioritize customer experience improvement initiatives according to business impact.
- Design practical solutions to eliminate friction and improve customer journeys.
- Strengthen collaboration between departments responsible for different customer journey stages.
- Establish a sustainable approach to customer journey management and continuous improvement.
- Develop an implementation plan for converting customer journey insights into measurable improvement initiatives.

Course Outline

DAY 01

Foundations of Customer Journey Management in Insurance

- Understanding customer journeys and their role in delivering superior insurance experiences.
- Customer journeys versus internal insurance processes.
- Key stages of the insurance customer lifecycle.
- Understanding customer needs, expectations, motivations, and behaviors.
- Identifying major customer touchpoints.
- Understanding critical moments and their impact on customer satisfaction.
- The relationship between customer journeys, satisfaction, loyalty, and retention.
- Identifying stakeholders responsible for different stages of the customer journey.

DAY 01 — CONTINUED

PRACTICAL APPLICATION

Define the customer journey for a selected insurance product and identify the key customer touchpoints at each stage.

DAY 02

Customer Journey Mapping and Touchpoint Analysis

- Customer journey mapping methodologies and techniques.
- Defining journey stages, customer objectives, and customer actions.
- Documenting customer interactions with the insurance organization.
- Analyzing customer needs and expectations throughout the journey.
- Mapping customer emotions, motivations, concerns, and experiences.
- Identifying customer pain points and sources of friction.
- Analyzing waiting times, repeated interactions, handoffs, and process complexity.
- Connecting customer journeys with internal processes and operational responsibilities.

PRACTICAL APPLICATION

Develop a detailed customer journey map covering insurance purchase, onboarding, servicing, and renewal.

DAY 03

Claims, Service and Digital Customer Journey Analysis

- Mapping the customer journey during claims submission and settlement.
- Identifying friction points within the claims experience.
- Analyzing policy servicing, amendments, and renewal journeys.
- Analyzing customer journeys across contact centers, branches, intermediaries, and distribution channels.
- Mapping and evaluating digital customer journeys.
- Assessing websites, mobile applications, customer portals, and digital platforms.
- Evaluating consistency and continuity across digital and traditional channels.

DAY 03 — CONTINUED

- Using complaints, customer feedback, and operational data to identify journey problems.
- Identifying gaps between expected and actual customer experiences.

PRACTICAL APPLICATION

Analyze an insurance claims journey and identify pain points, service delays, and opportunities for improvement.

DAY 04

Customer Journey Improvement and Future Experience Design

- Converting customer journey maps into practical improvement initiatives.
- Identifying opportunities to simplify processes and reduce customer friction.
- Redesigning customer touchpoints with the greatest impact on experience.
- Improving customer journeys through automation and digital services.
- Personalizing customer experiences according to customer segments and needs.
- Designing proactive customer experiences that prevent problems before they occur.
- Prioritizing initiatives according to customer and business impact.
- Using customer data and analytics to support journey redesign.
- Engaging cross-functional teams in customer journey improvement.
- Designing the future-state customer journey.

PRACTICAL APPLICATION

Redesign a selected insurance customer journey by documenting current pain points, proposed solutions, and the desired future-state experience.

DAY 05

Customer Journey Measurement, Governance and Implementation

- Developing customer journey performance indicators.
- Measuring satisfaction, effort, effectiveness, and performance across touchpoints.
- Linking customer journey indicators with operational and financial performance.

DAY 05 — CONTINUED

- Building management dashboards for customer journey monitoring.
- Establishing continuous customer feedback and improvement mechanisms.
- Defining governance and accountability for customer journey management.
- Prioritizing improvement initiatives and monitoring implementation.
- Measuring the impact of journey improvements on retention, loyalty, and profitability.
- Establishing a sustainable customer journey management model.
- Developing an implementation roadmap for customer journey improvement.

FINAL WORKSHOP

Develop a comprehensive customer journey map for an insurance organization, covering journey stages, touchpoints, customer needs, pain points, performance indicators, improvement opportunities, priorities, and an implementation roadmap.

Register or Request More Information

Course page: <https://quest-training.com/courses/customer-journey-mapping-for-insurance-companies-training-course>

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