

Course No. 1903

Digital Insurance Platforms & Customer Services Training Course

INSURANCE TECHNOLOGY & DIGITAL TRANSFORMATION
INSURANCE & RISK MANAGEMENT

DURATION

5 Days

DELIVERY

Classroom



Course Overview

The Digital Insurance Platforms & Customer Services Training Course provides a strategic and practical framework for designing, managing, and optimizing digital insurance platforms and customer service capabilities. The course focuses on how insurance organizations can use digital channels, self-service platforms, integrated technologies, and customer-centric processes to deliver faster, more accessible, personalized, and consistent insurance services.

The course examines the evolution of digital insurance platforms and their role in transforming customer interactions throughout the insurance lifecycle. Participants will explore digital quotation, onboarding, policy issuance, policy servicing, claims submission, payments, renewals, customer communications, and complaint management, with emphasis on creating seamless customer journeys across multiple channels.

Particular attention is given to customer experience management, platform usability, service personalization, data integration, digital communication, automation, artificial intelligence, and omnichannel service delivery. Participants will learn how to identify customer pain points, redesign digital journeys, improve service processes, and establish performance measures that support customer satisfaction and operational efficiency.

Through practical exercises, case studies, digital journey mapping, platform assessments, and service design workshops, participants will develop the ability to evaluate existing digital insurance platforms, identify improvement opportunities, design customer-centric services, and establish implementation priorities. The course supports insurers in building digital customer experiences that strengthen engagement, service quality, loyalty, and long-term business value.

Objectives

- By the end of the course, participants will be able to:
- Analyze the role of digital platforms in transforming insurance customer services.
- Evaluate digital insurance platforms across functionality, accessibility, usability, and customer experience.
- Map customer journeys across digital insurance channels.
- Identify customer pain points and opportunities for service improvement.

- Design customer-centric digital insurance services and self-service capabilities.
- Improve digital onboarding, quotation, policy servicing, claims, payments, and renewals.
- Apply automation and artificial intelligence to enhance customer service delivery.
- Strengthen omnichannel customer engagement and service consistency.
- Develop effective digital communication and personalization strategies.
- Establish performance indicators for digital customer experience and service quality.
- Identify technology, data, privacy, cybersecurity, and operational risks affecting digital services.
- Develop practical strategies for continuous improvement of digital insurance platforms.

Who Should Attend

This course is designed for insurance professionals responsible for digital platforms, customer experience, digital transformation, operations, distribution, and service delivery. It is particularly relevant to Digital Transformation Managers, Customer Experience Managers, Digital Product Managers, Operations Managers, Insurance Technology Professionals, Customer Service Managers, Distribution Managers, and Business Process Owners.

It is also suitable for executives and professionals working in underwriting, claims, policy administration, marketing, data management, information technology, risk management, and compliance who are involved in developing or improving digital insurance services and customer-facing platforms.

Learning Outcomes

- By the end of the course, participants will be able to:
- Explain the strategic role of digital insurance platforms in customer service transformation.
- Assess the maturity and effectiveness of existing digital insurance platforms.
- Map end-to-end digital customer journeys.
- Identify customer experience gaps and service friction points.
- Design improved digital onboarding and quotation experiences.
- Enhance digital policy administration and self-service capabilities.
- Improve digital claims submission and customer communication.

- Develop effective digital payment, renewal, and policy servicing experiences.
- Integrate automation and artificial intelligence into customer service processes.
- Develop omnichannel service strategies.
- Apply customer data and analytics to improve personalization.
- Establish key performance indicators for digital customer service.
- Identify and manage digital service risks.
- Develop improvement initiatives based on customer feedback and service performance.
- Build a practical roadmap for enhancing digital insurance platforms and customer services.

Course Outline

DAY 01

Digital Insurance Platforms and Customer Experience

- Evolution of digital insurance platforms.
- Strategic role of digital channels in modern insurance.
- Components of an effective digital insurance platform.
- Digital customer expectations and changing service behaviors.
- Customer-centric insurance operating models.
- Digital customer lifecycle and key interaction points.
- Platform usability, accessibility, convenience, and service quality.
- Identifying customer experience gaps and digital pain points.

PRACTICAL APPLICATION

Assess a digital insurance platform and identify key customer experience improvement opportunities.

DAY 02

Digital Customer Journeys and Self-Service

- Designing end-to-end digital customer journeys.
- Digital onboarding and customer information capture.
- Online quotations and product comparison.

DAY 02 — CONTINUED

- Digital policy issuance and document management.
- Self-service policy administration and policy changes.
- Digital renewals, cancellations, and service requests.
- Digital claims notification and submission.
- Customer notifications and real-time service updates.
- Reducing customer effort through simplified digital processes.

PRACTICAL APPLICATION

Design an optimized digital customer journey from onboarding to policy servicing.

DAY 03

Digital Claims, Payments and Service Automation

- Designing customer-centric digital claims experiences.
- Digital claims submission and document handling.
- Claims status tracking and proactive customer communication.
- Digital payments and premium collection.
- Automated customer service workflows.
- Intelligent routing and case management.
- Artificial intelligence applications in insurance customer service.
- Digital assistants and automated customer interactions.
- Managing exceptions and human intervention.

PRACTICAL APPLICATION

Design a digital claims and customer service workflow incorporating automation and appropriate human support.

DAY 04

Omnichannel Service, Personalization and Data

- Building integrated omnichannel insurance experiences.
- Connecting digital, mobile, contact center, and intermediary channels.
- Consistency of customer information and service across channels.
- Customer data and analytics for service personalization.
- Customer segmentation and targeted digital services.
- Proactive communication and customer engagement.
- Managing customer feedback and complaints digitally.
- Data privacy, cybersecurity, and digital service risks.
- Measuring customer satisfaction, engagement, and service performance.

PRACTICAL APPLICATION

Develop an omnichannel customer service model using customer data and performance insights.

DAY 05

Digital Platform Strategy, Governance and Continuous Improvement

- Developing a digital insurance platform strategy.
- Prioritizing platform capabilities and customer service initiatives.
- Establishing digital product and platform governance.
- Defining ownership, accountability, and service standards.
- Developing key performance indicators and customer experience dashboards.
- Measuring digital adoption, service efficiency, customer satisfaction, and retention.
- Managing technology, operational, cybersecurity, and implementation risks.
- Using customer feedback and analytics for continuous improvement.
- Developing a scalable and future-ready digital service model.

DAY 05 — CONTINUED

FINAL WORKSHOP

Develop an integrated Digital Insurance Platform & Customer Services roadmap covering platform capabilities, customer journeys, self-service, claims, payments, automation, artificial intelligence, omnichannel service, governance, performance indicators, and continuous improvement.

Register or Request More Information

Course page: <https://quest-training.com/courses/digital-insurance-platforms-customer-services-training-course>

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