

Course No. 2041

Health Insurance Strategy, Performance & Portfolio Management Training Course

**LIFE & HEALTH INSURANCE
INSURANCE & RISK MANAGEMENT**

DURATION

5 Days

DELIVERY

Classroom



Course Overview

The Health Insurance Strategy, Performance & Portfolio Management Training Course provides a comprehensive framework for developing and managing health insurance strategies, improving portfolio performance, and balancing growth, profitability, service quality, and risk management. The programme enables participants to understand the strategic, operational, financial, and market factors that influence the sustainability of health insurance portfolios.

The course covers the key components of health insurance strategy, including market analysis, customer segmentation, product design, pricing strategy, distribution channels, provider management, claims management, risk management, and reinsurance. Participants will explore how these elements can be aligned with organizational objectives, financial performance, operational efficiency, and long-term business sustainability.

Particular emphasis is placed on portfolio performance measurement and analysis, including loss ratios, claims ratios, claims frequency and severity, medical costs, profitability, premium growth, customer retention, provider performance, and operational efficiency. Participants will learn how to identify performance deterioration, recognize emerging trends, and develop appropriate corrective strategies.

The programme also addresses portfolio governance, strategic planning, risk management, data analytics, executive decision-making, and continuous improvement. Through practical case studies and applied exercises, participants will develop an integrated framework for managing health insurance portfolios and improving their financial, operational, and strategic performance.

Objectives

- By the end of this training course, participants will be able to:
- Analyze the key components and objectives of health insurance strategy.
- Evaluate health insurance market trends and customer requirements.
- Develop effective strategies for managing health insurance portfolios.
- Analyze and segment portfolios according to risk and performance characteristics.
- Evaluate health insurance product performance and profitability.

- Analyze loss ratios, claims performance, and medical costs.
- Assess the factors influencing premium growth and portfolio profitability.
- Apply appropriate performance indicators to monitor insurance portfolios.
- Evaluate healthcare provider performance and its impact on portfolio results.
- Assess underwriting, claims, and medical cost risks.
- Develop strategies to improve portfolio profitability and sustainability.
- Apply approaches to improve customer retention and service quality.
- Analyze insurance data to support strategic decision-making.
- Develop corrective action plans for deteriorating portfolio performance.
- Strengthen portfolio governance and associated risk management practices.
- Develop an integrated strategy for health insurance portfolio and performance management.

Who Should Attend

This course is designed for health insurance managers, insurance portfolio managers, product managers, underwriting managers, claims managers, operations managers, and strategic planning professionals responsible for managing and developing health insurance business.

It is also suitable for pricing specialists, actuaries, risk managers, finance professionals, reinsurance specialists, provider network managers, customer experience professionals, data analysts, and business development professionals involved in portfolio performance and strategic decision-making.

The programme is particularly relevant to executives and managers working in health insurance companies, insurance groups, healthcare management organizations, insurance brokers, reinsurance companies, healthcare organizations, and regulatory or supervisory institutions involved in the management and sustainability of health insurance portfolios.

Learning Outcomes

- Upon completion of the course, participants will be able to:
- Assess the strategic position of a health insurance portfolio.
- Analyze market conditions, competitive factors, and customer segments.

- Evaluate product and benefit structures within the portfolio.
- Analyze profitability across products and customer segments.
- Measure portfolio performance using integrated financial and operational indicators.
- Analyze loss ratios, claims performance, and medical cost trends.
- Identify the underlying causes of portfolio performance deterioration.
- Evaluate the impact of pricing, underwriting, and claims on profitability.
- Analyze healthcare provider performance and its impact on portfolio costs.
- Assess key risks affecting health insurance portfolios.
- Develop portfolio performance and profitability improvement plans.
- Establish early warning indicators for portfolio risk monitoring.
- Use insurance data and analytics to support portfolio decisions.
- Develop customer retention and sustainable growth strategies.
- Strengthen portfolio governance and strategic performance monitoring.
- Develop a comprehensive roadmap for improving health insurance portfolio performance and sustainability.

Course Outline

DAY 01

Health Insurance Strategy and Portfolio Management

- Fundamentals of health insurance strategy
- Commercial and operational portfolio objectives
- Health insurance market analysis
- Customer segmentation and needs assessment
- Product and benefit strategy
- Health insurance growth and expansion models
- Competitive analysis and market positioning
- Aligning insurance strategy with corporate strategy
- Key factors influencing portfolio sustainability

DAY 01 — CONTINUED

PRACTICAL APPLICATION

Assessing the strategic position of a health insurance portfolio

DAY 02**Health Insurance Portfolio and Profitability Management**

- Principles of insurance portfolio management
- Portfolio segmentation by products, customers, and risk
- Product and segment profitability analysis
- Managing business mix and portfolio composition
- Premium growth and customer retention
- Pricing and its relationship with portfolio performance
- Underwriting and risk quality management
- Claims management and its impact on profitability
- Reinsurance and portfolio protection

PRACTICAL APPLICATION

Analyzing health insurance portfolio profitability and performance

DAY 03**Performance Measurement, Loss Ratio and Cost Analysis**

- Health insurance performance measurement frameworks
- Premium and claims performance indicators
- Loss ratio analysis
- Claims frequency and severity
- Medical cost analysis and emerging trends
- High-cost and catastrophic claims
- Healthcare provider performance analysis
- Customer retention and service quality indicators

DAY 03 — CONTINUED

- Early warning indicators of performance deterioration

PRACTICAL APPLICATION

Developing a health insurance portfolio performance dashboard

DAY 04

Risk Management and Portfolio Performance Improvement

- Strategic and operational risks in health insurance
- Underwriting and pricing risks
- Claims and medical cost risks
- Healthcare provider risks
- Fraud, waste, and abuse
- Concentration and risk diversification
- Medical cost containment strategies
- Corrective actions for underperforming portfolios
- Data-driven risk management

PRACTICAL APPLICATION

Developing a health insurance portfolio performance improvement plan

DAY 05

Portfolio Governance and Future Strategy

- Health insurance portfolio governance
- Strategic portfolio planning
- Forecasting and scenario analysis
- Analytics for portfolio management
- Data-driven executive decision-making
- Managing growth, profitability, and sustainability
- Digital transformation in health insurance portfolio management

DAY 05 — CONTINUED

- Emerging risks and trends in health insurance
- Continuous improvement and strategic review
- Final Integrated Workshop: Developing a comprehensive Health Insurance Portfolio Strategy to improve performance, profitability, and long-term sustainability

Register or Request More Information

Course page: <https://quest-training.com/courses/health-insurance-strategy-performance-portfolio-management-training-course>

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