QUEST
Professional Center

PROFESSIONAL TRAINING COURSE

Course No. 1912

Insurance Business Intelligence & Data Visualization Training Course

INSURANCE DATA & ANALYTICS
INSURANCE & RISK MANAGEMENT

DURATION
5 Days

DELIVERY
Classroom

Course Overview

This advanced training course provides a practical framework for applying Business Intelligence and Data Visualization to insurance decision-making, performance management, risk analysis, customer intelligence, and operational improvement. It enables insurance professionals to transform complex insurance data into clear, actionable insights that support executives, managers, and decision makers.

The course examines how Business Intelligence can integrate data from underwriting, claims, policies, customers, pricing, finance, distribution, and operations to create a unified view of insurance performance. Participants will learn how to identify relevant data sources, define business requirements, develop meaningful performance indicators, and structure information for effective management reporting.

A major focus is placed on insurance data visualization and dashboard development. Participants will explore how to present trends, patterns, exceptions, risks, profitability, claims performance, customer behavior, and operational indicators through effective visual reporting. The course emphasizes selecting the right visualization for each business question and avoiding misleading or unnecessarily complex reporting.

The program also addresses data governance, data quality, dashboard governance, security, privacy, analytical interpretation, and communication of insights to senior management. Through practical exercises and case studies, participants will develop the ability to design insurance intelligence frameworks, build executive dashboards, interpret visual insights, and establish a roadmap for data-driven insurance management.

Objectives

- By the end of this course, participants will be able to:
- Understand the principles and strategic value of Business Intelligence in insurance.
- Analyze insurance data sources and identify requirements for management intelligence.
- Assess data quality, consistency, completeness, and reliability.
- Design insurance performance indicators aligned with business objectives.
- Apply Business Intelligence concepts to underwriting, claims, pricing, risk, and customer

management.
- Transform insurance data into meaningful management information.
- Select appropriate data visualization techniques for different insurance business questions.
- Design effective operational and executive dashboards.
- Analyze trends, patterns, anomalies, risks, and performance drivers through visual analytics.
- Develop reporting frameworks that support timely insurance decision-making.
- Communicate analytical insights clearly to executives and decision makers.
- Identify data governance, privacy, security, and reporting risks.
- Establish dashboard and Business Intelligence governance practices.
- Evaluate the effectiveness and business value of insurance intelligence solutions.
- Develop a practical roadmap for strengthening Business Intelligence and Data Visualization capabilities.

Who Should Attend

This course is designed for insurance executives, managers, department heads, business analysts, data analysts, business intelligence professionals, reporting specialists, and decision makers involved in insurance performance management and data-driven decision-making.

It is particularly relevant to professionals working in underwriting, claims management, pricing, actuarial functions, risk management, fraud management, customer analytics, product development, finance, operations, distribution, and strategic planning.

The course is also suitable for digital transformation, information technology, data governance, compliance, internal audit, and management reporting professionals who need to understand how insurance data can be transformed into actionable intelligence and communicated effectively through dashboards and visual reporting.

Learning Outcomes

- Upon completion of the course, participants will be able to:
- Explain the role of Business Intelligence across the insurance value chain.
- Identify relevant insurance data sources and intelligence requirements.

- Assess insurance data quality and reporting readiness.
- Define meaningful business questions for insurance analytics.
- Develop key performance indicators for insurance functions.
- Analyze underwriting, claims, pricing, customer, and portfolio performance.
- Identify trends, anomalies, patterns, and performance drivers through visual analytics.
- Select appropriate visualization techniques for different analytical requirements.
- Design effective operational, management, and executive dashboards.
- Develop reporting structures that provide timely and relevant business intelligence.
- Interpret visual analytics and translate findings into management recommendations.
- Communicate complex insurance information clearly to decision makers.
- Identify risks related to data quality, privacy, security, governance, and reporting.
- Establish effective dashboard governance and performance monitoring practices.
- Develop an implementation roadmap for Business Intelligence and Data Visualization in insurance.

Course Outline

DAY 01

Business Intelligence Foundations for Insurance

- Understanding Business Intelligence and its strategic role in insurance.
- The insurance data-to-insight lifecycle.
- Insurance data sources and information architecture.
- Policy, customer, underwriting, claims, pricing, financial, and operational data.
- Data integration and creating a unified view of insurance performance.
- Data quality, consistency, completeness, and reliability.
- Defining business questions and intelligence requirements.
- From operational data to management intelligence.
- Building a data-driven insurance organization.

DAY 01 — CONTINUED

> **PRACTICAL APPLICATION**
>
> Map insurance data sources and identify priority Business Intelligence requirements across key functions.

DAY 02

Insurance Performance Analytics and Key Performance Indicators

- Designing performance measurement frameworks for insurance.
- Underwriting performance indicators.
- Claims performance and loss analysis.
- Pricing and profitability indicators.
- Customer and retention analytics.
- Distribution and channel performance.
- Risk and portfolio performance indicators.
- Operational efficiency and service-level indicators.
- Executive performance reporting.

> **PRACTICAL APPLICATION**
>
> Develop a comprehensive insurance performance framework with relevant key performance indicators.

DAY 03

Data Visualization and Insurance Dashboards

- Principles of effective data visualization.
- Selecting the right visualization for different business questions.
- Presenting trends, comparisons, distributions, and relationships.
- Visualizing insurance risks and performance.
- Claims and underwriting dashboards.
- Customer and portfolio dashboards.

DAY 03 — CONTINUED

- Designing operational dashboards.
- Designing executive dashboards and management scorecards.
- Avoiding misleading, cluttered, or ineffective visual reporting.

> **PRACTICAL APPLICATION**
>
> Design an insurance dashboard that communicates key performance, risk, and operational insights.

DAY 04

Advanced Business Intelligence and Decision Support

- Using Business Intelligence to identify trends and emerging risks.
- Anomaly and exception analysis.
- Drill-down and interactive management reporting.
- Customer intelligence and behavioral analytics.
- Portfolio profitability and performance analysis.
- Fraud and risk intelligence dashboards.
- Combining Business Intelligence with predictive analytics and Artificial Intelligence.
- Turning visual insights into business recommendations.
- Communicating analytical findings to senior management.

> **PRACTICAL APPLICATION**
>
> Analyze an insurance intelligence dashboard and develop executive recommendations based on identified trends and exceptions.

DAY 05

Data Governance, Dashboard Governance and Implementation

- Insurance data governance and accountability.
- Data privacy, confidentiality, and information security.
- Managing data quality and reporting risks.
- Governance of dashboards and management information.

DAY 05 — CONTINUED

- Establishing consistent reporting definitions and standards.
- Monitoring dashboard effectiveness and data reliability.
- Measuring Business Intelligence value and adoption.
- Building organizational analytics and visualization capabilities.
- Prioritizing Business Intelligence initiatives and developing business cases.
- Final Practical Workshop: Develop an integrated Insurance Business Intelligence and Data Visualization Roadmap covering data sources, priority dashboards, key performance indicators, governance requirements, analytical capabilities, implementation phases, and value realization.

Register or Request More Information

Course page: https://quest-training.com/courses/insurance-business-intelligence-data-visualization-training-course
Website: https://quest-training.com
Email: info@quest-training.com
Phone: +905016771440