QUEST Professional Center

PROFESSIONAL TRAINING COURSE

Course No. 1811

Insurance Business Operations & Administration Training Course

INSURANCE MANAGEMENT & OPERATIONS
INSURANCE & RISK MANAGEMENT

DURATION
5 Days

DELIVERY
Classroom

LOCATION
Munich, Germany

DATES
28 Sept – 2 Oct 2026

Scheduled Event Details

CITY	Munich, Germany
DATE	28 Sept – 2 Oct 2026
DELIVERY TYPE	Classroom
COURSE FEE	€5,400

Course Overview

The Insurance Business Operations & Administration Training Course provides a comprehensive professional framework for understanding, managing, and improving the administrative and operational functions that support insurance business performance. The course focuses on the complete insurance business cycle and the coordination required between core insurance functions to ensure efficient processes, accurate transactions, consistent service delivery, and effective operational control.

The program covers the key operational activities involved in insurance administration, including insurance applications, underwriting support, policy issuance, policy administration, endorsements, renewals, premium administration, customer service, claims coordination, documentation, reporting, and operational controls. Participants will develop a clear understanding of how these functions interact and how weaknesses in one process can affect service quality, operational efficiency, and customer experience across the organization.

A major focus of the Insurance Business Operations & Administration Training Course is the practical management of day-to-day insurance operations. Participants will examine workflow management, roles and responsibilities, document and data administration, service standards, internal controls, operational risk, and performance monitoring. The course provides practical approaches for reducing processing errors, improving coordination, managing exceptions, and maintaining consistent operational standards.

Through practical exercises and insurance-focused case studies, participants will develop the ability to analyze operational workflows, identify improvement opportunities, strengthen cross-functional coordination, and improve the administration of insurance transactions. The program is particularly valuable for managers and specialists seeking a broader understanding of insurance business operations and the practical tools required to support efficient, controlled, and customer-focused insurance services.

Objectives

- Analyze the overall insurance business cycle and identify the key administrative and operational functions supporting insurance service delivery.
- Develop an integrated understanding of the relationship between underwriting, policy issuance, policy administration, renewals, premium administration, claims, and customer service.
- Evaluate operational procedures and clarify roles, responsibilities, handoffs, and dependencies across insurance departments.
- Apply practical methods for managing insurance applications, policies, endorsements, renewals, and routine operational transactions.
- Improve the administration of insurance documents, records, and operational data to support accuracy, accessibility, and process consistency.
- Assess operational quality and service levels and identify factors affecting the speed and accuracy of insurance transactions.
- Apply effective approaches for coordinating claims, customer service activities, policy administration, and other related operational functions.
- Strengthen administrative and operational controls designed to reduce errors, exceptions, process failures, and operational risks.
- Analyze operational reports and use performance information to support management decisions and corrective actions.
- Improve cross-functional coordination and reduce delays caused by unclear responsibilities, incomplete information, or ineffective communication.
- Apply continuous improvement practices to enhance insurance administration and operational processes.
- Develop an actionable plan for improving insurance business operations and administration within a defined organizational environment.

Who Should Attend

This course is designed for insurance operations managers, department heads, supervisors, team leaders, and professionals working in insurance operations, policy administration, customer service, underwriting support, claims administration, renewals, premium administration, and related functions. It is particularly suitable for professionals who manage insurance transactions, documentation, workflows, service processes, and day-to-day operational activities.

The program is also suitable for insurance executives, branch managers, operations managers, customer service managers, claims managers, underwriting managers, business and operations analysts, quality professionals, internal control specialists, operational risk professionals, and employees transitioning into administrative or operational roles within the insurance sector. It is also valuable for decision makers seeking to improve coordination between insurance functions, strengthen operational control, and enhance service quality and efficiency.

Learning Outcomes

- Explain the insurance business cycle and identify the principal functions supporting insurance products and services.
- Analyze the relationship between insurance administrative and operational functions and identify critical process dependencies.
- Manage insurance application, policy issuance, endorsement, servicing, and renewal procedures in a structured manner.
- Organize insurance documents, records, and operational information to support efficient administration and internal control.
- Coordinate operational activities across underwriting, policy administration, claims, customer service, and premium administration.
- Identify common causes of delays, errors, duplication, and ineffective coordination within insurance operations.
- Apply practical methods for improving transaction flow and reducing unnecessary processing and rework.
- Evaluate operational service levels and process quality using appropriate performance indicators.
- Prepare operational reports that help managers monitor activities, identify exceptions, and determine required actions.
- Strengthen operational controls and recognize risks associated with insurance transactions, documentation, data, and administrative procedures.
- Identify opportunities for process improvement, automation, and digital development within insurance administration.
- Develop a practical plan for improving insurance business operations, administrative efficiency, and service quality.

Course Outline

DAY 01

Foundations of Insurance Business Operations and Administration

- Understanding the insurance business model and the insurance service delivery cycle
- Insurance organizational structures and the relationship between core and supporting functions
- Roles of underwriting, operations, policy administration, claims, customer service, and premium administration
- Defining responsibilities, process ownership, handoffs, and cross-functional coordination

PRACTICAL APPLICATION OR DISCUSSION

Map an end-to-end insurance business cycle and identify its key functions and operational dependencies

DAY 02

Policy Administration and Insurance Transaction Management

- Managing insurance applications, customer information, and supporting documentation
- Policy issuance, endorsements, cancellations, renewals, and policy servicing procedures
- Managing insurance records, documents, data, and transaction workflows
- Handling exceptions, incomplete information, processing errors, and operational delays

PRACTICAL APPLICATION OR DISCUSSION

Analyze an insurance transaction from application through policy issuance and renewal and identify opportunities to improve administrative efficiency

DAY 03

Underwriting, Claims and Customer Service Operations

- Understanding the operational relationship between underwriting and policy administration
- Managing operational support for underwriting activities and application processing

DAY 03 — CONTINUED

- The claims administration cycle from notification and validation through assessment, settlement, and closure
- Managing customer inquiries, service requests, complaints, and service-level expectations

PRACTICAL APPLICATION OR DISCUSSION

Analyze a cross-functional insurance case requiring coordination between underwriting, operations, claims, and customer service

DAY 04

Operational Controls, Risk and Performance Management

- Principles of internal control within insurance administrative and operational processes
- Identifying operational risks related to transactions, documentation, data, approvals, and procedures
- Key Performance Indicators for measuring productivity, quality, turnaround time, workload, and service levels
- Operational reporting, exception management, performance monitoring, and corrective actions

PRACTICAL APPLICATION OR DISCUSSION

Develop an insurance operations performance monitoring framework and identify appropriate corrective actions

DAY 05

Insurance Operations Improvement and Operational Development

- Identifying opportunities to improve insurance administrative and operational processes
- Simplifying procedures and reducing delays, errors, duplication, and unnecessary rework
- The role of automation and digital transformation in modern insurance administration
- Establishing continuous improvement practices and strengthening cross-functional coordination

DAY 05 — CONTINUED

> **FINAL WORKSHOP, ACTION PLAN, OR IMPLEMENTATION EXERCISE**
>
> Develop a practical Insurance Business Operations Improvement Plan covering priorities, improvement actions, performance indicators, responsibilities, timelines, and monitoring mechanisms.

Register or Request More Information

Course page: https://quest-training.com/courses/insurance-business-operations-administration-training-course
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