QUEST
Professional Center

PROFESSIONAL TRAINING COURSE

Course No. 1473

Insurance Operations & Administration

INSURANCE & FINANCIAL SERVICES
FINANCE, INVESTMENT & BANKING

DURATION
5 Days

DELIVERY
Classroom

LOCATION
Makkah, Kingdom of Saudi Arabia

DATES
4 – 8 Jan 2027

Scheduled Event Details

CITY	Makkah, Kingdom of Saudi Arabia
DATE	4 – 8 Jan 2027
DELIVERY TYPE	Classroom
COURSE FEE	€4,200

Course Overview

The Insurance Operations & Administration Training Course provides an advanced and practical framework for managing the administrative and operational activities that support insurance organizations and ensure the efficient execution of insurance transactions. The course focuses on improving operational efficiency, data accuracy, documentation quality, service standards, internal controls, and coordination across underwriting, claims, finance, sales, compliance, and customer service functions.

Insurance operations form the critical link between technical insurance decisions and their execution. Effective operations require more than processing transactions quickly; they depend on accurate data, complete documentation, clearly defined workflows, appropriate controls, accountability, and effective coordination between departments. This course examines how insurance organizations can establish consistent, efficient, measurable, and well-controlled operating processes.

The program covers the insurance operations lifecycle, including policy issuance, endorsements, renewals, cancellations, premium administration, billing, collections, customer records, document management, intermediary administration, claims support, reconciliations, and operational reporting. Participants will learn how to map workflows, identify bottlenecks, reduce duplication and manual errors, strengthen controls, and improve the accuracy and timeliness of operational processing.

The course also examines automation, digital insurance operations, data quality, system integration, access controls, third-party service providers, business continuity, and operational resilience. Particular attention is given to using technology and process redesign to improve turnaround times, service quality, operational transparency, and management visibility while maintaining appropriate governance and control standards.

Through case studies, process mapping exercises, documentation reviews, workflow analysis, performance measurement workshops, and operational improvement projects, the Insurance Operations & Administration Training Course develops practical capabilities for strengthening insurance administration and operational performance. The program is suitable for insurance and reinsurance companies, brokers, financial institutions, government entities, regulatory organizations, executives, managers, and specialists working across insurance operations.

Objectives

- Analyze the structure and strategic role of insurance operations and administration within the insurance value chain.
- Develop practical frameworks for managing the policy lifecycle from issuance through endorsement, renewal, amendment, and cancellation.
- Evaluate the quality, completeness, accuracy, and consistency of insurance data and documentation.
- Apply effective workflow management techniques to improve processing times, accountability, and operational productivity.
- Design operational controls that reduce errors, duplication, incomplete processing, and transaction risks.
- Assess billing, premium administration, collection, reconciliation, and refund processes.
- Improve coordination between operations, underwriting, claims, finance, sales, customer service, and compliance.
- Evaluate opportunities for automation and digital transformation across insurance administrative processes.
- Assess operational risks associated with brokers, intermediaries, vendors, external service providers, and technology platforms.
- Develop operational performance indicators covering productivity, quality, turnaround time, service levels, and control effectiveness.
- Improve customer experience by simplifying processes, reducing delays, and improving communication and information quality.
- Align insurance operations and administration with governance, compliance, operational resilience, and organizational performance objectives.

Who Should Attend

This course is designed for professionals working in insurance operations, administration, customer service, policy administration, claims support, underwriting operations, finance, collections, intermediary management, and business process improvement. It is particularly relevant to Insurance Operations Managers, Administration Managers, Policy Administration Specialists, Operations Analysts, Claims Coordinators, Customer Service Managers, Premium Administration Specialists, Collection Officers, Documentation Specialists, and professionals responsible for insurance transaction processing.

The program is also suitable for Chief Executive Officers, Operations Directors, Claims Directors, Heads of Underwriting, Finance Managers, Customer Experience Managers, Digital Transformation Managers, Quality Managers, and senior decision makers responsible for operational efficiency, service quality, internal controls, and business performance. Professionals working in government entities, regulatory authorities, banks, financial institutions, insurance companies, reinsurers, brokers, and large corporations with significant insurance programs can also benefit from the course.

The course is particularly valuable for professionals involved in policy issuance, endorsements, renewals, cancellations, premium collection, reconciliations, claims processing, broker administration, operational reporting, and process improvement. Internal audit, compliance, risk management, and data governance professionals can also benefit from understanding how operational workflows, controls, systems, and data quality influence insurance performance.

Learning Outcomes

- Explain the complete insurance operations lifecycle and the responsibilities of key operational functions.
- Analyze policy administration processes from issuance through endorsement, renewal, cancellation, and closure.
- Evaluate the quality and integrity of insurance data, documents, records, and transaction information.
- Develop process maps and identify bottlenecks, duplication, delays, and control weaknesses.
- Apply operational controls to strengthen documentation, transaction accuracy, authorization, and data integrity.
- Evaluate premium billing, collection, reconciliation, refund, and payment processes.

- Improve coordination between operations, underwriting, claims, finance, sales, and customer service.
- Identify opportunities for automation and digital transformation across insurance operations.
- Assess operational risks related to intermediaries, outsourced providers, systems, and third-party service arrangements.
- Develop operational performance indicators covering productivity, quality, turnaround time, service levels, and operational risk.
- Design initiatives to improve customer experience and reduce processing time and avoidable errors.
- Prepare an integrated insurance operations improvement plan covering process design, controls, technology, performance measurement, and governance.

Course Outline

DAY 01

Insurance Operations Foundations and Policy Administration

- Role of insurance operations within the insurance value chain
- Organizational structure of insurance operations and functional responsibilities
- Insurance policy lifecycle from application to issuance, renewal, and cancellation
- Policy issuance, data capture, document verification, and quality checks
- Endorsements, amendments, cancellations, refunds, and policy adjustments
- Document management, records management, and operational filing
- Coordination between operations, underwriting, sales, and customer service
- Key control points within the policy lifecycle

> **PRACTICAL APPLICATION**
>
> Map the lifecycle of an insurance policy and identify responsibilities, control points, processing risks, and improvement opportunities

DAY 02

Transaction Management, Premium Administration and Customer Service

- Premium billing and policy-related financial transactions
- Collections, payment processing, reconciliation, and follow-up
- Refunds, adjustments, and premium corrections
- Administration of brokers, agents, intermediaries, and distribution channels
- Customer requests, inquiries, complaints, and service processes
- Service standards, turnaround times, and case management
- Escalation procedures and exception handling
- Documentation and reconciliation between operational and financial records

PRACTICAL APPLICATION

Analyze a customer and premium administration process and identify causes of delays, errors, and reconciliation issues

DAY 03

Claims Administration and Cross-Functional Insurance Operations

- Relationship between policy administration and claims processing
- Claims notification, registration, and data validation
- Claims documentation and supporting information requirements
- Coordination between claims, underwriting, finance, and operations
- Processing updates, notices, amendments, and status changes
- Settlement, payment, recovery, and reconciliation processes
- Managing outstanding, delayed, and complex operational cases
- Operational reporting for claims activities

PRACTICAL APPLICATION

Analyze an insurance claim from registration through settlement and identify workflow weaknesses and opportunities for process improvement

DAY 04

Operational Controls, Automation and Data Quality

- Principles of internal control within insurance operations
- Authorization, segregation of duties, and access management
- Data quality, validation, completeness, and consistency
- Operational errors, system risks, and transaction controls
- Automation and process redesign in insurance administration
- System integration, workflow platforms, and digital insurance processes
- Third-party and outsourced service provider risks
- Business continuity and operational resilience
- Operational quality and control indicators

PRACTICAL APPLICATION

Assess an insurance process and identify opportunities for automation, stronger controls, improved data quality, and operational resilience

DAY 05

Operational Performance, Governance and Continuous Improvement

- Designing an effective operating model for insurance organizations
- Operational productivity, quality, and service-level indicators
- Monitoring turnaround time, backlogs, processing quality, and exceptions
- Root-cause analysis of operational errors, delays, and rework
- Continuous process improvement and operational efficiency
- Governance, accountability, escalation, and operational oversight
- Management and executive reporting for insurance operations
- Linking operational improvement to financial performance and customer experience
- Change management for new systems, processes, and digital initiatives

DAY 05 — CONTINUED

> **FINAL WORKSHOP**
>
> Develop and present an integrated insurance operations improvement plan covering policy administration, transactions, premium administration, claims support, data quality, automation, controls, performance indicators, customer experience, governance, and implementation priorities

Register or Request More Information

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