QUEST
Professional Center

PROFESSIONAL TRAINING COURSE

Course No. 1813

Insurance Operations Management Training Course

INSURANCE MANAGEMENT & OPERATIONS
INSURANCE & RISK MANAGEMENT

DURATION
5 Days

DELIVERY
Classroom

Course Overview

The Insurance Operations Management Training Course provides a comprehensive and practical framework for managing, controlling, and improving the operational activities that support insurance business performance. The course focuses on developing the capabilities required to manage insurance operations efficiently while maintaining service quality, process consistency, operational control, and alignment with organizational objectives.

The program examines the key stages of the insurance operations cycle, including insurance applications, underwriting support, policy issuance, policy administration, endorsements, renewals, premium administration, customer service, claims processing, and operational reporting. Participants will understand how these functions interact and how effective coordination between departments can improve workflow, reduce delays, minimize errors, and enhance the overall customer experience.

The Insurance Operations Management Training Course places strong emphasis on practical operational management, including workload planning, resource allocation, workflow management, service-level monitoring, operational controls, and performance measurement. Participants will learn how to establish relevant Key Performance Indicators for productivity, quality, turnaround time, cost, workload, and service levels, while developing approaches for addressing operational deviations and recurring performance issues.

Through practical exercises and insurance-focused case studies, participants will strengthen their ability to analyze operational workflows, improve process coordination, manage operational risks, and support continuous improvement. The course provides managers and professionals with practical tools for creating more structured, efficient, controlled, and customer-focused insurance operations.

Objectives

- Analyze the insurance operations lifecycle and identify key functions, activities, handoffs, and dependencies across departments.
- Develop effective approaches for managing day-to-day insurance operations and ensuring smooth transaction processing.

- Evaluate the efficiency of underwriting support, policy issuance, policy administration, renewals, customer service, and claims operations.
- Apply practical methods for managing workloads, resources, task allocation, and operational priorities.
- Improve insurance workflows by reducing delays, errors, duplication, rework, and unnecessary processing activities.
- Design relevant Key Performance Indicators for measuring productivity, quality, turnaround time, cost, workload, and service levels.
- Analyze operational reports to identify performance deviations, recurring problems, and sources of operational inefficiency.
- Strengthen operational controls and manage risks associated with insurance transactions, documentation, processes, and data.
- Improve coordination between insurance operations, underwriting, claims, customer service, and supporting functions.
- Apply continuous improvement practices to strengthen insurance processes and operational efficiency.
- Assess opportunities for automation and digital transformation that can improve insurance operations.
- Develop an actionable insurance operations improvement plan with measurable objectives, performance indicators, priorities, and responsibilities.

Who Should Attend

This course is designed for insurance operations managers, department heads, supervisors, team leaders, and professionals working in policy administration, underwriting support, renewals, premium administration, claims operations, customer service, and related insurance functions. It is particularly suitable for professionals responsible for managing daily transactions, allocating resources, monitoring service levels, and improving operational workflows.

The program is also suitable for insurance executives, branch managers, operations directors, claims managers, underwriting managers, customer service managers, business and operations analysts, performance professionals, quality specialists, operational risk professionals, internal control specialists, and digital transformation teams. It provides strong value for decision makers seeking to improve operational efficiency, strengthen process control, enhance insurance service quality, and connect day-to-day operations with organizational objectives.

Learning Outcomes

- Explain the insurance operations lifecycle and identify the key functions and activities involved in delivering insurance services.
- Analyze workflow structures, handoffs, dependencies, and coordination requirements across insurance departments.
- Manage day-to-day insurance transactions according to operational priorities, procedures, and service-level requirements.
- Evaluate the performance of underwriting support, policy administration, renewals, claims, and customer service operations.
- Plan workloads and allocate operational resources according to business volumes, priorities, and service requirements.
- Identify the causes of delays, processing errors, duplication, and rework within insurance operations.
- Use Key Performance Indicators to measure productivity, quality, turnaround time, cost, workload, and service levels.
- Analyze operational reports and identify performance deviations requiring corrective or preventive action.
- Apply appropriate operational controls to reduce risks associated with insurance transactions, documentation, and data.
- Improve coordination between insurance functions and reduce delays caused by unclear responsibilities or ineffective communication.
- Identify opportunities for continuous improvement, process automation, and digital transformation within insurance operations.
- Develop a practical plan for improving insurance operations management, operational performance, and service quality.

Course Outline

DAY 01

Foundations of Insurance Operations Management

- Understanding Insurance Operations Management and its role in organizational performance
- Mapping the insurance operations lifecycle from application and underwriting support through policy administration, renewals, and claims
- Understanding the operating relationship between insurance operations, underwriting, claims, customer service, and supporting functions
- Defining process ownership, responsibilities, handoffs, operational dependencies, and service requirements

PRACTICAL APPLICATION OR DISCUSSION

Develop an end-to-end insurance operations map and identify key operational strengths and weaknesses

DAY 02

Workflow, Workload and Resource Management

- Managing insurance transactions, applications, documentation, and operational workflows
- Planning workloads and allocating tasks and resources according to operational priorities
- Managing turnaround times, service levels, workload volumes, and operational bottlenecks
- Managing exceptions, delays, errors, rework, and operational backlogs

PRACTICAL APPLICATION OR DISCUSSION

Analyze an insurance workflow, identify causes of delays, and redesign task allocation to improve operational efficiency

DAY 03

Underwriting, Claims and Customer Service Operations

- Managing operational support for underwriting and insurance application processing
- Managing policy issuance, endorsements, renewals, and policy servicing activities

DAY 03 — CONTINUED

- Managing the insurance claims lifecycle from notification and validation through assessment, settlement, and closure
- Coordinating insurance operations with customer service, inquiries, complaints, and service requests

> **PRACTICAL APPLICATION OR DISCUSSION**
>
> Analyze a cross-functional operational case involving underwriting, operations, claims, and customer service

DAY 04

Performance Measurement, Controls and Operational Risk

- Designing Key Performance Indicators for insurance operations
- Measuring productivity, quality, turnaround time, cost, workload, and service levels
- Developing operational reports and performance dashboards and analyzing performance deviations
- Identifying operational risks and strengthening internal controls across insurance processes

> **PRACTICAL APPLICATION OR DISCUSSION**
>
> Develop an insurance operations performance monitoring framework and determine appropriate corrective actions

DAY 05

Insurance Operations Improvement and Operational Development

- Applying continuous improvement principles to insurance operations
- Simplifying procedures and reducing errors, delays, duplication, and unnecessary rework
- Identifying opportunities for automation and digital transformation in insurance operations
- Establishing mechanisms for sustaining improvements and strengthening operational team performance

DAY 05 — CONTINUED

> **FINAL WORKSHOP, ACTION PLAN, OR IMPLEMENTATION EXERCISE**
>
> Develop a comprehensive Insurance Operations Improvement Plan covering operational priorities, KPIs, improvement initiatives, responsibilities, implementation timelines, and performance monitoring mechanisms.

Register or Request More Information

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