QUEST
Professional Center

PROFESSIONAL TRAINING COURSE

Course No. 1809

Insurance Operations Performance Management Course

INSURANCE MANAGEMENT & OPERATIONS
INSURANCE & RISK MANAGEMENT

DURATION
5 Days

DELIVERY
Classroom

LOCATION
Vienna, Austria

DATES
11 – 15 Jan 2027

Scheduled Event Details

CITY	Vienna, Austria
DATE	11 – 15 Jan 2027
DELIVERY TYPE	Classroom
COURSE FEE	€5,700

Course Overview

The Insurance Operations Performance Management Training Course provides a comprehensive professional framework for measuring, managing, and improving insurance operational performance. The course focuses on transforming operational data into actionable performance insights that support efficiency, service quality, risk control, customer satisfaction, and sustainable organizational performance. It is designed to address the practical challenges faced by insurance companies and financial institutions in managing complex, high-volume operational environments.

The program examines the end-to-end insurance operations cycle, covering policy administration, underwriting support, policy issuance, renewals, premium administration, customer service, claims processing, settlement, and operational reporting. Participants will learn how to identify bottlenecks, delays, duplication, errors, and non-value-added activities that can negatively affect operational efficiency and customer experience.

A central focus of the Insurance Operations Performance Management Training Course is the development and application of meaningful Key Performance Indicators (KPIs). Participants will explore how to measure productivity, turnaround time, service levels, processing quality, operational cost, claims performance, workload, and process effectiveness. The course also demonstrates how performance dashboards and management reports can support timely decision-making and effective operational governance.

Through practical exercises, case studies, and workplace-oriented applications, participants will develop the ability to diagnose performance gaps, analyze root causes, prioritize improvement opportunities, and establish measurable action plans. The program provides managers and specialists with practical tools for strengthening insurance operations, improving process consistency, supporting digital transformation, and aligning operational performance with broader business objectives.

Objectives

- Analyze the complete insurance operations cycle and identify key activities, control points, operational dependencies, and performance gaps during the course.
- Develop a structured insurance operations performance management framework aligned with organizational objectives and operational priorities.
- Evaluate the efficiency of underwriting support, policy administration, issuance, renewals, and customer service processes using measurable performance indicators.
- Apply practical methods for measuring claims processing performance, including turnaround time, quality, accuracy, productivity, and service levels.
- Design relevant Key Performance Indicators for measuring operational productivity, quality, cost, responsiveness, and process effectiveness.
- Analyze operational data and performance reports to identify trends, deviations, recurring issues, and opportunities for improvement.
- Improve insurance workflows by identifying bottlenecks, unnecessary activities, duplication, rework, and process inefficiencies.
- Assess customer service and customer experience indicators and connect them with insurance operational performance.
- Apply root cause analysis techniques to recurring operational problems affecting underwriting, policy administration, claims, and customer service.
- Design management dashboards and operational reports that provide decision makers with clear and actionable performance information.
- Implement practical approaches for continuous improvement, process optimization, and appropriate operational automation.
- Develop a measurable insurance operations improvement plan with priorities, responsibilities, performance indicators, and implementation timelines.

Who Should Attend

This course is designed for insurance operations managers, department heads, supervisors, team leaders, and professionals working across policy administration, underwriting operations, claims management, customer service, renewals, premium administration, policy servicing, and related insurance functions. It is particularly relevant to professionals responsible for monitoring operational performance, improving workflows, maintaining service standards, and ensuring consistent execution of insurance processes.

The program is also suitable for Chief Operating Officers, insurance executives, operations directors, claims managers, underwriting managers, customer experience managers, business process improvement professionals, operational excellence specialists, performance analysts, business analysts, quality professionals, operational risk specialists, internal control professionals, digital transformation teams, and professionals involved in insurance process optimization. It is valuable for decision makers seeking to connect operational performance with cost efficiency, customer experience, risk management, and organizational objectives.

Learning Outcomes

- Map and analyze end-to-end insurance operations and identify relationships between functions, activities, handoffs, and control points.
- Define appropriate Key Performance Indicators for different stages of insurance operations based on specific operational objectives.
- Measure team productivity, transaction quality, processing speed, service levels, and operational efficiency using structured performance measures.
- Analyze underwriting support, policy issuance, policy servicing, and renewal processes to identify opportunities for operational improvement.
- Evaluate claims processing performance from initial notification and validation through assessment, settlement, and closure.
- Use operational data to identify trends, performance deviations, recurring problems, workload patterns, and emerging operational risks.
- Apply root cause analysis techniques to distinguish underlying process problems from their operational symptoms.
- Assess the operational impact of delays, errors, rework, duplication, and inefficient workflows on cost and customer experience.
- Prepare concise operational performance reports that support management review, corrective action, and performance improvement.
- Design practical performance dashboards for monitoring insurance operations and communicating critical performance information.
- Identify opportunities for process simplification, automation, digital enablement, and continuous improvement within insurance operations.
- Develop an actionable insurance operations performance improvement plan with measurable targets, ownership, priorities, and monitoring mechanisms.

Course Outline

DAY 01

Foundations of Insurance Operations Performance Management

- Understanding insurance operations performance management and its role in organizational efficiency
- Mapping the end-to-end insurance operations lifecycle from application and underwriting through policy issuance, servicing, renewal, and claims
- Linking corporate strategy, operational objectives, and performance management
- Identifying stakeholders, process owners, handoffs, dependencies, and operational responsibilities

> **PRACTICAL APPLICATION OR DISCUSSION**
> Mapping an insurance process and identifying performance gaps, bottlenecks, and improvement opportunities

DAY 02

Insurance Operations KPIs and Performance Measurement

- Designing Key Performance Indicators for underwriting operations, policy administration, customer service, and renewals
- Measuring productivity, efficiency, turnaround time, quality, cost, workload, and service levels
- Developing claims performance indicators for processing, assessment, settlement, and closure
- Establishing performance baselines, targets, thresholds, and measurement frequencies

> **PRACTICAL APPLICATION OR DISCUSSION**
> Developing a balanced KPI framework for an insurance operations function and interpreting performance results

DAY 03

Process Analysis and Operational Quality

- Analyzing insurance workflows and identifying value-added and non-value-added activities
- Identifying bottlenecks, delays, duplication, rework, errors, and process breakdowns
- Applying root cause analysis to recurring insurance operational problems
- Managing process quality, data accuracy, documentation, and transaction integrity

PRACTICAL APPLICATION OR DISCUSSION

Analyzing a complex insurance operations case involving delays and recurring errors and developing corrective actions

DAY 04

Performance Dashboards and Continuous Improvement

- Developing effective operational performance reports for executives and management teams
- Designing performance dashboards for insurance operations monitoring
- Analyzing trends, variances, workload indicators, and performance patterns
- Applying process improvement, workflow optimization, automation, and digital transformation principles

PRACTICAL APPLICATION OR DISCUSSION

Designing an insurance operations performance dashboard and converting performance findings into improvement initiatives

DAY 05

Advanced Performance Management and Operations Improvement

- Connecting operational performance with cost efficiency, customer experience, operational risk, and business performance
- Prioritizing insurance operations improvement initiatives based on business impact and implementation feasibility

DAY 05 — CONTINUED

- Managing operational change and strengthening adoption of improved processes and performance standards
- Establishing performance review, escalation, corrective action, and continuous monitoring mechanisms

FINAL WORKSHOP, ACTION PLAN, OR IMPLEMENTATION EXERCISE

Developing a comprehensive Insurance Operations Performance Improvement Plan with KPIs, targets, initiatives, ownership, timelines, and performance monitoring mechanisms

Register or Request More Information

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