QUEST Professional Center

PROFESSIONAL TRAINING COURSE

Course No. 1814

Insurance Operations Strategy Training Course

INSURANCE MANAGEMENT & OPERATIONS
INSURANCE & RISK MANAGEMENT

DURATION	DELIVERY
5 Days	**Classroom**

Course Overview

The Insurance Operations Strategy Training Course provides a strategic and practical framework for designing, implementing, and managing insurance operations strategies that support business growth, operational efficiency, service quality, risk management, and long-term organizational performance. The course moves beyond day-to-day operational management to examine how insurance operations can be deliberately structured and aligned with corporate strategy, customer expectations, financial objectives, and changing market requirements.

The program explores the strategic management of the insurance operating model, including policy administration, underwriting operations, claims management, customer service, premium administration, process governance, workforce planning, technology enablement, performance management, and operational risk. Participants will learn how to assess the current operating environment, identify capability gaps, evaluate operational priorities, and develop a clear roadmap for improving insurance operations.

A central focus of the Insurance Operations Strategy Training Course is the alignment between operational capabilities and strategic business objectives. Participants will examine how operating models, processes, resources, technology, performance indicators, and governance mechanisms can be integrated to support profitable growth and consistent service delivery. The course also addresses the strategic implications of automation, digital transformation, data utilization, outsourcing, and process redesign within insurance operations.

Through practical exercises, strategic analysis, and insurance-focused case studies, participants will develop the ability to formulate operational strategies, establish strategic priorities, define performance measures, evaluate improvement initiatives, and build implementation roadmaps. The course provides executives, managers, and insurance professionals with the tools required to strengthen operational resilience, improve organizational agility, and create a more efficient and strategically aligned insurance operating environment.

Objectives

- Analyze the strategic role of insurance operations and its contribution to organizational growth, profitability, customer value, and competitive performance.
- Evaluate the current insurance operating model and identify capability gaps, process

weaknesses, resource constraints, and strategic priorities.

- Develop an insurance operations strategy aligned with corporate objectives, customer requirements, financial goals, and risk considerations.
- Assess the effectiveness of underwriting, policy administration, claims, customer service, and premium administration from a strategic perspective.
- Design operational priorities and strategic initiatives that improve efficiency, service quality, scalability, and organizational resilience.
- Apply performance management principles to translate insurance operations strategy into measurable objectives and Key Performance Indicators.
- Evaluate technology, automation, and digital transformation opportunities based on strategic value, operational feasibility, risk, and customer impact.
- Strengthen operational governance, accountability, process ownership, and cross-functional coordination.
- Assess workforce and capability requirements needed to support current and future insurance operating strategies.
- Analyze operational risks, business continuity considerations, and resilience requirements when developing insurance operations strategies.
- Prioritize strategic improvement initiatives according to business impact, investment requirements, implementation complexity, and organizational risk.
- Develop a practical implementation roadmap for executing and monitoring an insurance operations strategy.

Who Should Attend

This course is designed for insurance executives, operations directors, senior managers, department heads, and managers responsible for developing or executing insurance operations strategies. It is particularly relevant to leaders overseeing policy administration, underwriting operations, claims, customer service, premium administration, business transformation, operational performance, process improvement, and service delivery.

The program is also suitable for strategy and planning professionals, business and operations analysts, operational excellence specialists, transformation leaders, risk managers, quality professionals, digital transformation teams, and professionals responsible for operating model development and performance management. It is valuable for decision makers who need to align insurance operations with corporate strategy, customer expectations, financial objectives, technology developments, and changing business requirements.

Learning Outcomes

- Assess the strategic position and maturity of an insurance operations function and identify major capability gaps.
- Analyze the insurance operating model and determine how processes, people, technology, governance, and performance management interact.
- Develop an insurance operations strategy that supports corporate objectives and defined business priorities.
- Evaluate the strategic performance of underwriting, policy administration, claims, customer service, and premium administration.
- Define strategic operational objectives and translate them into measurable Key Performance Indicators.
- Identify and prioritize opportunities for process optimization, automation, digital transformation, and service improvement.
- Evaluate workforce capabilities, resource requirements, and organizational structures needed to execute an operations strategy.
- Strengthen governance frameworks, process ownership, accountability, and cross-functional decision-making.
- Identify operational risks and incorporate resilience, continuity, and risk considerations into strategic planning.
- Assess improvement initiatives based on expected business value, customer impact, implementation effort, and risk.
- Develop strategic initiatives that improve scalability, efficiency, service quality, and operational resilience.
- Prepare an implementation roadmap for an insurance operations strategy with clear priorities, milestones, ownership, KPIs, and monitoring mechanisms.

Course Outline

DAY 01

Strategic Foundations of Insurance Operations

- Understanding the strategic role of insurance operations in organizational performance
- Linking insurance operations with corporate strategy, financial objectives, customer value, and business growth
- Assessing the insurance operating environment, market expectations, and operational challenges
- Evaluating the insurance operating model, organizational capabilities, and strategic alignment

PRACTICAL APPLICATION OR DISCUSSION

Conduct a strategic assessment of an insurance operations function and identify key capability gaps and priorities

DAY 02

Insurance Operating Model and Strategic Process Management

- Designing effective insurance operating models and organizational structures
- Strategic management of underwriting operations, policy administration, claims, customer service, and premium administration
- Process ownership, governance, cross-functional coordination, and accountability
- Identifying process dependencies, operational bottlenecks, scalability challenges, and service gaps

PRACTICAL APPLICATION OR DISCUSSION

Evaluate an insurance operating model and develop recommendations for improving strategic alignment and operational effectiveness

DAY 03

Performance, Technology and Operational Transformation

- Translating insurance operations strategy into measurable objectives and Key Performance Indicators
- Developing strategic performance frameworks and executive operational dashboards
- Evaluating automation, digital transformation, data utilization, and technology-enabled operations
- Assessing the strategic impact of process redesign and digital service delivery

PRACTICAL APPLICATION OR DISCUSSION

Develop a strategic performance framework and identify priority technology and process transformation opportunities

DAY 04

Operational Risk, Resilience and Capability Development

- Integrating operational risk management into insurance operations strategy
- Business continuity, operational resilience, and preparedness for operational disruption
- Workforce planning, skills, organizational capabilities, and resource requirements
- Managing strategic change and strengthening organizational readiness

PRACTICAL APPLICATION OR DISCUSSION

Develop an operational resilience and capability improvement framework for a selected insurance function

DAY 05

Strategy Execution, Prioritization and Implementation

- Prioritizing insurance operations initiatives based on business value, customer impact, complexity, cost, and risk
- Developing strategic initiatives for efficiency, scalability, service quality, and operational excellence
- Establishing governance structures for strategy execution and performance monitoring

DAY 05 — CONTINUED

- Developing implementation roadmaps, milestones, ownership, KPIs, and review mechanisms

> **FINAL WORKSHOP, ACTION PLAN, OR IMPLEMENTATION EXERCISE**
>
> Develop a comprehensive Insurance Operations Strategy and Implementation Roadmap covering strategic objectives, operational initiatives, KPIs, resources, responsibilities, timelines, risks, and performance monitoring.

Register or Request More Information

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