Quest Professional Center

PROFESSIONAL TRAINING COURSE

Course No. 1815

Insurance Operations Transformation Training Course

INSURANCE MANAGEMENT & OPERATIONS
INSURANCE & RISK MANAGEMENT

DURATION
5 Days

DELIVERY
Classroom

Course Overview

The Insurance Operations Transformation Training Course provides a strategic and practical framework for transforming insurance operations in response to changing business requirements, technological developments, customer expectations, and organizational priorities. The course focuses on helping insurance organizations move from traditional operational models toward more agile, integrated, efficient, and customer-focused operating environments while maintaining appropriate governance, risk management, and operational controls.

The program examines the transformation of the complete insurance operations lifecycle, including underwriting operations, policy administration, policy servicing, renewals, premium administration, claims processing, customer service, and operational reporting. Participants will learn how to assess current-state operations, identify performance and capability gaps, simplify processes, redesign workflows, and establish a target operating model that supports efficiency, scalability, service quality, and organizational resilience.

A central focus of the Insurance Operations Transformation Training Course is the strategic integration of process improvement, automation, data, digital technologies, workforce capabilities, and performance management. Participants will evaluate automation opportunities, explore data-driven operational management, assess digital service models, and understand how technology-enabled transformation can improve processing efficiency and customer experience while maintaining appropriate controls and risk management practices.

Through practical exercises and insurance-focused case studies, participants will develop the ability to structure transformation programs, prioritize initiatives, assess business value, manage organizational change, and develop implementation roadmaps. The course provides executives, managers, and specialists with practical tools for transforming insurance operations in a structured and measurable manner and for establishing a foundation for continuous operational improvement.

Objectives

- Analyze the current state of insurance operations and identify performance, process, capability, technology, and service gaps.
- Develop an integrated insurance operations transformation strategy aligned with organizational objectives and business requirements.

- Evaluate insurance processes and identify opportunities for redesign, simplification, automation, and digital transformation.
- Design improved operating models that support efficiency, agility, scalability, service quality, and operational resilience.
- Apply practical approaches to redesign workflows across underwriting, policy administration, claims, renewals, and customer service.
- Assess automation, data, and digital technology opportunities based on business value, operational feasibility, customer impact, and risk.
- Develop Key Performance Indicators for measuring transformation progress, operational improvement, and business outcomes.
- Strengthen governance, operational risk management, controls, and accountability throughout transformation initiatives.
- Evaluate workforce, skills, resource, and capability requirements for implementing future insurance operating models.
- Apply change management practices to strengthen organizational readiness and adoption of transformed processes.
- Prioritize transformation initiatives according to business value, customer impact, investment requirements, complexity, and risk.
- Develop a practical transformation roadmap covering initiatives, milestones, responsibilities, resources, performance measures, and implementation priorities.

Who Should Attend

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

The program is also suitable for digital transformation leaders, business transformation managers, strategic project managers, business and operations analysts, process improvement specialists, technology and data professionals, operational risk managers, quality and governance professionals, and insurance professionals responsible for developing operating models. It provides particular value to decision makers seeking to build more efficient, scalable, resilient, technology-enabled, and customer-focused insurance operations.

Learning Outcomes

- Assess the maturity of insurance operations and identify critical performance, capability, process, and technology gaps.
- Analyze the current operating model and determine which processes require redesign, simplification, automation, or transformation.
- Develop an insurance operations transformation strategy aligned with organizational objectives and business priorities.
- Redesign insurance processes to improve efficiency, processing speed, quality, consistency, and customer experience.
- Identify suitable automation and digital transformation opportunities across underwriting, policy administration, claims, and customer service.
- Evaluate the impact of technology and data on operational efficiency, decision-making, service quality, and process control.
- Design performance indicators for monitoring transformation progress and measuring operational improvement.
- Identify operational and change-related risks and develop appropriate controls and response mechanisms.
- Determine the workforce capabilities, skills, resources, and organizational requirements needed for the target operating model.
- Apply change management practices to improve employee readiness and adoption of transformed processes.
- Prioritize transformation initiatives based on value, impact, effort, cost, complexity, and risk.
- Develop an integrated implementation roadmap for insurance operations transformation with clear milestones, ownership, resources, KPIs, and monitoring mechanisms.

Course Outline

DAY 01

Strategic Foundations of Insurance Operations Transformation

- Understanding operational transformation in the insurance sector and its strategic importance
- Assessing the current insurance operations environment and identifying performance and capability gaps

DAY 01 — CONTINUED

- Evaluating the existing operating model, processes, organizational capabilities, and technology landscape
- Aligning transformation objectives with corporate strategy, customer experience, operational performance, and business priorities

> **PRACTICAL APPLICATION OR DISCUSSION**
>
> Conduct a diagnostic assessment of an insurance operations function and identify priority transformation areas

DAY 02

Process Redesign and the Target Operating Model

- Analyzing current insurance processes and identifying complexity, duplication, bottlenecks, and operational waste
- Redesigning underwriting, policy administration, renewals, claims, and customer service processes
- Developing integrated and customer-focused workflows
- Designing the target operating model, including roles, capabilities, processes, governance, and controls

> **PRACTICAL APPLICATION OR DISCUSSION**
>
> Redesign a selected insurance process and develop a target operating model for improved operational performance

DAY 03

Automation, Data and Digital Operations

- Assessing automation opportunities across insurance operations
- Using data and analytics to support operational decision-making and performance improvement
- Developing digital service channels and improving customer interactions
- Evaluating the impact of technology on process efficiency, quality, governance, and operational risk

DAY 03 — CONTINUED

> **PRACTICAL APPLICATION OR DISCUSSION**
>
> Identify and prioritize automation and digital transformation opportunities for a selected insurance process

DAY 04

Change Management, Governance and Operational Risk

- Managing organizational change within insurance operations transformation programs
- Developing workforce capabilities, skills, resources, and organizational readiness
- Establishing transformation governance, accountability, decision-making, and performance oversight
- Managing operational risk, change risk, business continuity, and operational resilience during transformation

> **PRACTICAL APPLICATION OR DISCUSSION**
>
> Develop a change management, governance, and risk framework for an insurance transformation initiative

DAY 05

Transformation Execution and Performance Measurement

- Prioritizing transformation initiatives based on business value, customer impact, cost, effort, complexity, and risk
- Developing Key Performance Indicators for measuring transformation progress and operational outcomes
- Building transformation roadmaps with phases, milestones, resources, ownership, and dependencies
- Establishing monitoring, benefits tracking, performance reviews, and continuous improvement mechanisms

DAY 05 — CONTINUED

> **FINAL WORKSHOP, ACTION PLAN, OR IMPLEMENTATION EXERCISE**
>
> Develop a comprehensive Insurance Operations Transformation Roadmap covering strategic objectives, transformation initiatives, KPIs, resources, responsibilities, implementation phases, risks, and performance monitoring.

Register or Request More Information

Course page: https://quest-training.com/courses/insurance-operations-transformation-training-course
Website: https://quest-training.com
Email: info@quest-training.com
Phone: +905016771440