QUEST
Professional Center

PROFESSIONAL TRAINING COURSE

Course No. 1902

Insurance Process Automation & Digital Operations Training Course

INSURANCE TECHNOLOGY & DIGITAL TRANSFORMATION
INSURANCE & RISK MANAGEMENT

DURATION
5 Days

DELIVERY
Classroom

Course Overview

The Insurance Process Automation & Digital Operations Training Course provides a practical framework for transforming traditional insurance processes into efficient, automated, and digitally enabled operations. The course focuses on how insurance organizations can use process automation, workflow technologies, data integration, artificial intelligence, and digital platforms to reduce manual work, improve processing speed, strengthen control, and enhance customer experience.

The program examines automation opportunities across the insurance value chain, including customer onboarding, quotation, underwriting, policy issuance, endorsements, renewals, premium collection, claims processing, payments, reconciliation, customer service, and regulatory reporting. Participants will learn how to identify process bottlenecks, eliminate unnecessary activities, standardize workflows, and prioritize automation opportunities based on business value and operational risk.

Particular attention is given to designing effective digital operating processes that combine automation with appropriate human oversight. The course addresses workflow orchestration, robotic process automation, intelligent document processing, application programming interfaces, data integration, artificial intelligence, automated decision-making, exception management, and digital process monitoring.

Through practical exercises, process-mapping activities, case studies, and automation scenarios, participants will develop the ability to assess current processes, design future-state workflows, establish automation priorities, define performance indicators, and manage implementation risks. The course supports insurance organizations in creating scalable digital operations that improve efficiency, accuracy, transparency, service quality, and operational resilience.

Objectives

- By the end of the course, participants will be able to:
- Analyze the role of process automation in modern insurance operations.
- Assess insurance processes and identify automation opportunities.
- Map current-state processes and identify bottlenecks, duplication, and manual dependencies.

- Design streamlined and digitally enabled insurance workflows.
- Evaluate automation technologies for different insurance use cases.
- Apply automation principles to underwriting, claims, policy administration, payments, and customer service.
- Integrate workflow automation with data, applications, and digital platforms.
- Establish appropriate controls and human oversight within automated processes.
- Develop automation business cases based on efficiency, cost, quality, risk, and customer value.
- Define performance indicators for measuring digital operations and automation benefits.
- Identify operational, technology, cybersecurity, data, and change-management risks.
- Develop practical implementation roadmaps for insurance process automation.

Who Should Attend

This course is designed for insurance professionals responsible for operations, process improvement, digital transformation, automation, technology, and service delivery. It is particularly relevant to Operations Managers, Process Excellence Managers, Digital Transformation Managers, Automation Specialists, Insurance Technology Professionals, Business Process Owners, Policy Administration Managers, Claims Managers, Underwriting Managers, and Customer Service Leaders.

It is also suitable for professionals in finance, risk management, compliance, data management, internal control, and business transformation, as well as executives and decision makers seeking to improve operational efficiency and establish scalable digital operating capabilities across their insurance organization.

Learning Outcomes

- By the end of the course, participants will be able to:
- Explain the principles of insurance process automation and digital operations.
- Identify high-value automation opportunities across insurance processes.
- Map and analyze current-state insurance workflows.
- Identify process inefficiencies, bottlenecks, duplication, and manual risks.
- Design future-state automated and digitally enabled workflows.

- Evaluate the suitability of different automation technologies.
- Apply automation concepts to underwriting and claims processes.
- Improve policy administration, payments, collections, and reconciliation through automation.
- Design effective exception-handling and human-review mechanisms.
- Strengthen data integration and information flow across insurance systems.
- Develop automation business cases and investment priorities.
- Establish performance indicators for automated operations.
- Identify and manage risks associated with automation and digital operations.
- Develop implementation and change-management plans.
- Build a practical roadmap for scaling process automation across an insurance organization.

Course Outline

DAY 01

Foundations of Insurance Process Automation

- Understanding process automation and digital operations in insurance.
- Evolution from manual insurance processes to digital operating models.
- Mapping the insurance value chain and identifying automation opportunities.
- Identifying process bottlenecks, duplication, delays, and manual dependencies.
- Process standardization and simplification before automation.
- Selecting processes based on volume, complexity, risk, cost, and customer impact.
- Establishing process ownership and accountability.
- Governance principles for insurance automation programs.

PRACTICAL APPLICATION

Map a selected insurance process and identify its highest-value automation opportunities.

DAY 02

Automation Across Underwriting and Policy Administration

- Digital customer onboarding and information capture.
- Automated quotation and application processing.
- Workflow automation in underwriting.
- Rules-based underwriting and automated decision support.
- Digital policy issuance and document generation.
- Automated endorsements, renewals, cancellations, and policy changes.
- Data validation and integration between insurance systems.
- Automated notifications and customer communications.
- Managing exceptions and human intervention.

> **PRACTICAL APPLICATION**
>
> Design an automated workflow for customer onboarding, underwriting, and policy issuance.

DAY 03

Claims, Payments and Intelligent Insurance Operations

- Automating the insurance claims lifecycle.
- Digital claims submission and document processing.
- Intelligent document processing and information extraction.
- Automated claims validation and routing.
- Straight-through processing and automated approvals.
- Fraud indicators and automated claims screening.
- Automated payments, collections, and reconciliation.
- Workflow automation for finance and operational controls.
- Using artificial intelligence and analytics to support operational decisions.

> **PRACTICAL APPLICATION**
>
> Design an automated claims-processing workflow with appropriate controls and exception management.

DAY 04

Digital Integration, Data and Operational Control

- Connecting insurance applications and digital platforms.
- Application programming interfaces and system integration.
- Data flows across underwriting, claims, finance, and customer systems.
- Workflow orchestration and end-to-end process visibility.
- Automation monitoring and operational dashboards.
- Data quality and validation within automated processes.
- Access controls, segregation of duties, and audit trails.
- Cybersecurity, privacy, and operational risks associated with automation.
- Managing automation failures, exceptions, and business continuity.

> **PRACTICAL APPLICATION**
>
> Develop an integrated digital workflow connecting multiple insurance functions and define its key control points.

DAY 05

Automation Strategy, Implementation and Continuous Improvement

- Developing an enterprise-wide insurance automation strategy.
- Building automation portfolios and prioritizing initiatives.
- Developing business cases and calculating expected benefits.
- Measuring cost reduction, productivity, accuracy, processing time, and customer impact.
- Establishing key performance indicators for digital operations.
- Managing organizational change and workforce adoption.
- Scaling successful automation solutions across the organization.
- Governance, risk management, and continuous improvement.
- Developing an automation implementation roadmap.

DAY 05 — CONTINUED

> **FINAL WORKSHOP**
> Design an integrated Insurance Process Automation & Digital Operations roadmap covering priority processes, automation opportunities, technology requirements, controls, performance indicators, implementation phases, and expected business outcomes.

Register or Request More Information

Course page: https://quest-training.com/courses/insurance-process-automation-digital-operations-training-course
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