QUEST
Professional Center

PROFESSIONAL TRAINING COURSE

Course No. 1810

Insurance Process Improvement & Operational Excellence Training Course

INSURANCE MANAGEMENT & OPERATIONS
INSURANCE & RISK MANAGEMENT

DURATION
5 Days

DELIVERY
Classroom

Course Overview

The Insurance Process Improvement & Operational Excellence Training Course provides a structured and practical framework for analyzing, redesigning, and improving insurance processes to achieve higher levels of operational efficiency, service quality, productivity, and organizational performance. The course focuses on helping insurance professionals move beyond routine process management toward systematic process improvement supported by performance measurement, root cause analysis, quality management, and continuous improvement.

The program examines the end-to-end insurance operating environment, including insurance applications, underwriting support, policy issuance, policy administration, endorsements, renewals, premium administration, customer service, claims processing, settlement, and related operational activities. Participants will learn how to identify process bottlenecks, unnecessary activities, duplication, delays, errors, rework, and inefficient handoffs that can affect cost, service quality, compliance, and customer experience.

A key component of the Insurance Process Improvement & Operational Excellence Training Course is the application of practical process improvement techniques to insurance operations. Participants will explore process mapping, workflow analysis, waste identification, root cause analysis, process redesign, performance measurement, and continuous improvement. The course also addresses how automation and digital transformation can be incorporated into process improvement initiatives while maintaining appropriate operational controls and quality standards.

Through practical exercises and workplace-based case studies, participants will develop the ability to assess existing processes, prioritize improvement opportunities, redesign selected workflows, establish meaningful performance indicators, and develop implementation plans. The program supports insurance organizations in building more efficient, consistent, customer-focused, and measurable operations while strengthening a culture of operational excellence and continuous improvement.

Objectives

- Analyze existing insurance processes and identify bottlenecks, delays, duplication, rework, errors, and operational inefficiencies during the course.
- Develop clear process maps that define activities, responsibilities, handoffs, dependencies,

controls, and key decision points.

- Evaluate insurance process efficiency using turnaround time, productivity, quality, cost, workload, and service-level indicators.
- Apply continuous improvement principles to simplify insurance procedures and eliminate non-value-added activities.
- Analyze root causes of recurring operational problems and develop measurable corrective and preventive actions.
- Design practical process improvements that enhance workflow efficiency, operational consistency, and output quality.
- Improve selected underwriting, policy administration, claims, renewal, and customer service processes using structured improvement methodologies.
- Assess opportunities for automation and digital process transformation based on business value, operational requirements, risks, and feasibility.
- Develop Key Performance Indicators to measure the effectiveness and sustainability of insurance process improvement initiatives.
- Prioritize process improvement initiatives according to operational impact, implementation effort, customer value, and organizational priorities.
- Strengthen change management practices that support the adoption and sustainability of improved insurance processes.
- Develop an actionable Insurance Process Improvement and Operational Excellence Plan with defined initiatives, targets, responsibilities, and measurement mechanisms.

Who Should Attend

This course is designed for insurance operations managers, department heads, supervisors, team leaders, and professionals involved in underwriting operations, policy administration, claims management, policy servicing, renewals, premium administration, customer service, and insurance process management. It is particularly relevant to professionals responsible for improving workflows, reducing operational inefficiencies, maintaining service standards, and enhancing process quality.

The program is also suitable for Chief Operating Officers, insurance executives, operations directors, claims managers, underwriting managers, customer experience managers, business process improvement specialists, operational excellence professionals, quality managers, performance analysts, business analysts, internal control professionals, operational risk specialists, digital transformation teams, and continuous improvement practitioners. It is valuable for decision makers seeking to improve operational efficiency, reduce process complexity, strengthen customer experience, and align process improvement initiatives with strategic business objectives.

Learning Outcomes

- Map current-state insurance processes and clearly identify activities, handoffs, decision points, controls, and operational dependencies.
- Identify process bottlenecks, waiting time, duplication, rework, unnecessary approvals, errors, and non-value-added activities.
- Evaluate insurance process performance using measurable indicators for speed, quality, productivity, cost, and service levels.
- Apply root cause analysis techniques to identify the underlying causes of recurring insurance operational problems.
- Redesign selected insurance workflows to reduce complexity, improve process flow, and increase operational consistency.
- Apply process improvement techniques to underwriting support, policy administration, renewals, claims processing, and customer service.
- Identify opportunities to improve customer experience by simplifying processes and reducing unnecessary service delays.
- Evaluate insurance processes for automation and digital transformation based on operational value, feasibility, risk, and control requirements.
- Design Key Performance Indicators that measure the effectiveness and sustainability of process improvement initiatives.
- Prioritize improvement opportunities according to business impact, customer value, implementation effort, and operational risk.
- Establish practical approaches for embedding continuous improvement and operational excellence within insurance teams.
- Develop an implementation-ready improvement plan with measurable objectives, initiatives, ownership, timelines, and performance monitoring mechanisms.

Course Outline

DAY 01

Foundations of Insurance Process Improvement and Operational Excellence

- Understanding Insurance Process Improvement and its role in operational excellence
- Mapping the end-to-end insurance operating cycle
- Understanding the relationship between underwriting, policy administration, claims, customer service, and supporting functions
- Identifying process owners, stakeholders, handoffs, dependencies, and operational controls

PRACTICAL APPLICATION OR DISCUSSION

Develop an initial process map for a selected insurance process and identify major performance challenges and improvement opportunities

DAY 02

Insurance Process Mapping and Waste Reduction

- Process mapping techniques for insurance operations
- Analyzing workflow, process sequence, handoffs, and decision points
- Identifying bottlenecks, delays, duplication, rework, errors, and unnecessary activities
- Evaluating value-added and non-value-added activities

PRACTICAL APPLICATION OR DISCUSSION

Analyze an existing insurance process and identify opportunities to reduce waste, simplify workflow, and improve process flow

DAY 03

Process Redesign, Root Cause Analysis and Quality Improvement

- Applying root cause analysis to recurring insurance operational problems
- Process redesign and optimization of activities, responsibilities, and controls

DAY 03 — CONTINUED

- Improving underwriting support, policy issuance, policy servicing, endorsements, and renewals
- Improving claims processing, reducing errors, and minimizing unnecessary rework

> **PRACTICAL APPLICATION OR DISCUSSION**
>
> Redesign an insurance process affected by delays, quality issues, and operational inefficiencies

DAY 04

Performance Measurement, Automation and Digital Process Improvement

- Designing Key Performance Indicators for insurance process improvement
- Measuring turnaround time, productivity, quality, cost, workload, and service levels
- Identifying suitable opportunities for insurance process automation
- Evaluating digital transformation opportunities while maintaining quality, controls, and operational risk management

> **PRACTICAL APPLICATION OR DISCUSSION**
>
> Develop a performance dashboard for an insurance process improvement initiative and identify suitable automation opportunities

DAY 05

Operational Excellence, Change Management and Implementation

- Building a culture of continuous improvement and operational excellence in insurance organizations
- Prioritizing process improvement initiatives based on business impact, effort, customer value, and risk
- Managing organizational change and strengthening adoption of redesigned insurance processes
- Establishing governance, performance reviews, corrective actions, and sustainability mechanisms

DAY 05 — CONTINUED

FINAL WORKSHOP, ACTION PLAN, OR IMPLEMENTATION EXERCISE

Develop a comprehensive Insurance Process Improvement and Operational Excellence Plan covering improvement initiatives, objectives, KPIs, responsibilities, implementation timelines, and monitoring mechanisms.

Register or Request More Information

Course page: https://quest-training.com/courses/insurance-process-improvement-operational-excellence-training-course
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