InsurTech Value Cases: Partner Selection, Claims Automation and Pilot Governance Training Course

8 – 12 February 2027
New York

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Programme Summary

InsurTech value cases is the subject of this one-week training course for strategy, innovation and claims leaders at insurers at managerial level, ending in a technology investment and pilot plan for one business line. Insurers receive many digital proposals, yet benefits are often asserted, partners chosen on demonstrations and pilots left without exit rules. The programme moves from the insurance value chain and use cases to value case building, then to partner selection and claims automation, and then to pilot governance and scaling. Mars Training Centre UK delivers this programme on InsurTech value cases to mixed-organisation cohorts.

The Business Case

Life, motor, health and property insurers face pressure to cut handling time and cost per claim while keeping fair outcomes. Vendors offer automation in claims, underwriting and distribution, but weak data, unclear contracts and ungoverned pilots can stall projects. Leaders who test benefit claims on evidence and set clear decision gates can invest where benefits are real.

- Investment Discipline: Improves as benefits are stated, tested and tracked against a baseline.
- Claims Handling Efficiency: Rises as suitable steps are automated and exceptions are routed to people.
- Partner Risk Exposure: Falls as data, outsourcing and exit terms are reviewed before commitment.

Principles and Evidence Base

- IAIS Report on Fintech Developments in the Insurance Industry: Describes InsurTech use across underwriting, distribution and claims and the supervisory issues it raises, applied in Sessions 1 and 3 to use case selection.
- Net Present Value Appraisal: Compares the value of future benefits and costs on a common basis, applied in Session 2 to the value case.
- Third-Party and Outsourcing Risk Oversight: Treats data, continuity and exit terms as matters for board attention, applied in Sessions 3 and 4 to partner and pilot review.

Intended Participants

- Strategy and innovation leaders who sponsor technology investments at an insurer.
- Claims and operations managers who own handling steps that may be automated.
- Underwriting managers who assess digital decision tools.
- Finance and risk managers who review business cases and partner risk.

Typical settings include life insurance, general insurance, health insurance and reinsurance.

Learning Outcomes

1. Participants will be able to evaluate InsurTech use cases against the insurance value chain.
2. Participants will be able to construct a value case with a baseline, benefits and costs.
3. Participants will be able to diagnose which claims steps suit automation and which need judgement.
4. Participants will be able to prioritise technology partners against defined criteria.
5. Participants will be able to design pilot governance with decision gates and exit rules.
6. Participants will be able to justify an investment and pilot plan to an executive committee.

Programme Structure

Day 1: InsurTech Value Cases and the Insurance Value Chain

Where along the value chain can technology change cost, speed or client outcomes?

- Insurance Value Chain Map
- Use Case Long List
- Pain Point Scoring Sheet
- Data Readiness Check
- Supervisory Issue Scan

Day 2: Building the Value Case

Which benefits can be shown, and what would stop them arriving?

- Baseline Measurement Sheet
- Benefit and Cost Model
- Net Present Value Appraisal Table
- Sensitivity and Risk Grid
- Executive Summary Page

Day 3: Partner Selection and Claims Automation

Which partner fits the need, and which claims steps should be automated?

- Partner Criteria Matrix
- Claims Process Step Map
- Automation Suitability Screen
- Straight-Through Handling Rule Set
- Vendor Due Diligence Checklist

Day 4: Contracts, Controls and Pilot Governance

How are pilots governed so that results can be trusted and stopped if needed?

- Outsourcing Risk Review Form
- Data Protection and Access Terms Sheet
- Pilot Charter Template
- Decision Gate Criteria
- Exit and Continuity Plan

Day 5: Investment and Pilot Plan for One Business Line

Do the earlier tools combine into one plan that an executive committee can approve?

- Applying the Session 1 Use Case Long List
- Testing the Session 2 Benefit and Cost Model
- Checking the Session 3 Partner Criteria Matrix
- Rehearsing the Session 4 Decision Gate Criteria
- Completing the Investment and Pilot Plan

Methodology

The programme uses case analysis built on prepared files for two business lines, one motor claims and one life underwriting, each with process maps, handling data, vendor proposals and a draft pilot brief. Participants work in small groups, test value cases against the data, and defend partner choices to peers acting as an executive committee.

- Suggested activity: Recalculating a vendor benefit claim against the handling baseline and naming the gap.
- Suggested activity: Ranking three partners against agreed criteria and justifying the order.
- Suggested activity: Writing decision gate criteria for a pilot and the evidence needed at each gate.

Capstone Output

Each participant completes an investment and pilot plan for one business line. It holds a use case shortlist, a value case with baseline and sensitivities, a partner comparison, a pilot charter with decision gates and an exit plan. The plan is used at work to brief an executive committee.

Frequently Asked Questions

Is a programme on InsurTech value cases suitable for leaders without a technology background?

Yes. InsurTech value cases are taught through prepared files and templates. It assumes experience in insurance strategy, claims, operations or finance, but no coding.

Which framework does InsurTech value cases rest on?

InsurTech value cases rest on the report of the International Association of Insurance Supervisors on fintech in insurance, net present value appraisal and third-party and outsourcing risk oversight.

How is the plan from InsurTech value cases used at work?

You use the investment and pilot plan to brief an executive committee and set the evidence needed at each pilot decision gate.

How does InsurTech value cases differ from a general digital transformation programme?

InsurTech value cases concentrates on proving benefits, choosing partners and governing pilots in insurance, while a general digital transformation programme concentrates on change leadership and technology roadmaps.