POWER BI FOR INSURANCE ANALYTICS



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TRAINING CENTER

GENTEX Training Center LLC | Orlando - FL, USA
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Introduction

Power BI for Insurance Analytics Training Course shows insurance professionals how to turn policy, claims and premium data into dashboards that support underwriting and operations decisions. Participants learn to connect core insurance systems, clean and model the data, and build measures that reveal loss ratios, claims trends and portfolio performance. The programme covers Power Query preparation, star schema design, DAX measures, claims and underwriting dashboards, and data governance for policyholder information. Furthermore, it addresses regulatory reporting and access control. As a result, delegates can monitor portfolio health and spot deterioration early. Gentex Training Center delivers the programme through hands-on dashboard workshops on insurance datasets.

Power BI for Insurance Analytics Course Objectives

- Connect to policy administration, claims and finance data sources.
- Clean and transform insurance data using Power Query.
- Build a star schema model with policy, claims, date and party dimensions.
- Write DAX measures for premium, claims, loss ratio and combined ratio.
- Apply time intelligence for written, earned and incurred analysis.
- Analyse claims frequency, severity and settlement cycle performance.
- Build underwriting and portfolio dashboards by class, channel and region.
- Apply renewal, lapse and persistency analysis in reports.
- Apply row-level security and data governance to policyholder data.
- Schedule refresh and distribute reports to underwriting and management teams.

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Course Methodology

The course combines short demonstrations with extensive hands-on workshops using realistic insurance datasets. Participants build queries, model data, write DAX measures and publish dashboards, then present insights to a review panel. In addition, structured peer review and group discussion reinforce each technique, and every day closes with an applied analytics task.

Who Should Take This Course

- Insurance analysts, actuaries and pricing support staff.
- Underwriting and portfolio performance analysts.
- Claims analysis and operations reporting teams.
- Finance and management reporting staff in insurers.
- Risk, compliance and internal audit professionals.
- Brokers and distribution analysts studying portfolio performance.

Power BI for Insurance Analytics Course Outlines

Day 1: Connecting and Preparing Insurance Data

- Power BI Desktop, service and workspace overview.
- Connecting to policy administration, claims and finance sources.
- Power Query for cleaning, merging and transforming data.
- Handling policy transactions, endorsements and cancellations.
- Building a clean claims register from raw claim records.
- Data quality checks and preparation documentation.
- Workshop: preparing a policy and claims extract for modelling.

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Day 2: Data Modelling for Insurance Reporting

- Star schema design for insurance analytics.
- Fact and dimension tables: policies, claims, parties, dates, covers.
- Relationship design, filter direction and grain decisions.
- Date tables and time intelligence preparation.
- Handling multi-currency and multi-entity insurance groups.
- Model performance and file size management.
- Workshop: building an insurance data model with a date table.

Day 3: DAX Measures for Insurance Metrics

- Calculated columns versus measures in insurance models.
- Core measures: gross and net premium, claims incurred and paid.
- Loss ratio, expense ratio and combined ratio calculations.
- Earned versus written premium and unearned premium reserve logic.
- Frequency, severity and average claim measures.
- Settlement days, outstanding claims and reserving indicators.
- Workshop: writing a DAX measure set for an insurance report.

Day 4: Claims, Underwriting and Portfolio Dashboards

- Claims dashboard design: frequency, severity and settlement cycle.
- Underwriting dashboard by class, channel, region and broker.
- Renewal, lapse and persistency analysis reporting.
- Portfolio concentration and exposure analysis.
- Drill-through from summary to individual policy and claim records.

- Visualisation best practice and avoiding misleading charts.
- Workshop: building an underwriting and claims dashboard.

Day 5: Governance, Compliance and Distribution

- Row-level security for underwriting and branch teams.
- Data governance, lineage and sensitivity labelling for policyholder data.
- Regulatory and actuarial reporting requirements.
- Scheduled refresh, gateways and data source credentials.
- Publishing to workspaces, apps and distribution lists.
- Documentation, handover and report maintenance.
- Workshop: publishing and presenting an insurance dashboard before a review panel.

Conclusion

By successfully completing Power BI for Insurance Analytics Training Course, participants will have acquired the knowledge to build dashboards that reveal portfolio, claims and underwriting performance. They will understand data preparation, modelling, DAX measures, insurance metric calculation, governance and distribution, and they will know how to deliver analysis that managers rely on. As a result, delegates cut manual reporting effort and improve portfolio insight. Gentex Training Center builds the programme around current insurance analytics practice.

FAQs for the Power BI for Insurance Analytics course

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Q1 What is the "Power BI for Insurance Analytics" course about?

It teaches insurance professionals to build dashboards from policy, claims and premium data in Power BI. You learn data preparation, insurance modelling, DAX measures for loss and combined ratios, claims and underwriting dashboards, and governance.

Q2 What are the key benefits of the "Power BI for Insurance Analytics" course?

You gain faster portfolio reporting and earlier sight of claims deterioration. You also reduce manual spreadsheet work, measure loss and combined ratios consistently, give underwriters drillable detail, control access to policyholder data, and refresh reports automatically each period.

Q3 What skills will I gain from the "Power BI for Insurance Analytics" course?

You will gain insurance data preparation and modelling, DAX measure development for insurance metrics, claims and underwriting dashboard design, and Power BI governance, refresh and distribution management.

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Q4 What tools, methods, or standards are covered in the "Power BI for Insurance Analytics" course?

The course covers Microsoft Power BI Desktop and the Power BI service, Power Query transformations, star schema modelling with policy and claims fact tables, DAX functions including CALCULATE, FILTER and time intelligence, loss ratio, expense ratio and combined ratio measures, earned versus written premium logic, frequency and severity analysis, row-level security, scheduled refresh and gateways, and regulatory and actuarial reporting requirements.

Q5 How is the "Power BI for Insurance Analytics" course applied in real-world practice?

Graduates apply it to build monthly portfolio and claims dashboards, monitor loss and combined ratios by class and channel, track renewal and lapse performance, analyse settlement cycle times, provide underwriters with drill-down access, secure policyholder data for different teams, and schedule refreshes so reports stay current.