

# SERVICES OVERVIEW



## Accounting & Billing Services

From bookkeeping to financial forecasting, we ensure your finances are audit-ready and strategically aligned.

## Recruitment & Talent Sourcing Support

Hire, retain, and develop top talent with tailored recruitment strategies and workforce optimization.



## Loss Control Inspection & Risk Mitigation Support

Streamline inspections, manage risks, and ensure compliance with precision-driven workflows.

## Digital Marketing Services

Drive traffic, engagement, and conversions with SEO, PPC, social media, and reputation management.



## Customer Service & Email Support

Deliver seamless customer support across calls, emails, and chats to boost loyalty and satisfaction.

## Back Office Support

Manage data, documents, and administrative tasks so your team focuses on core priorities.



## IT Solutions

Optimize infrastructure, cybersecurity, and software integration for future-ready operations.

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# Accounting & Billing Services

## Financial Statements & Reporting

- Balance sheet, P&L, cash flow
- General ledger reconciliations
- Customized management reports
- KPI & dashboard reporting
- Budgeting & Forecasting

## Bookkeeping & Daily Accounting

- Transaction management
- General ledger maintenance
- Month-end closings
- Journal entries

## Payroll & Compliance

- Weekly & bi-weekly payroll
- Tax filing & compliance
- Deductions & benefits handling
- 2 Tax Statement or Form 1099

## Real Estate Accounting

- Rent roll & lease tracking
- Property-level financials
- CapEx Accounting
- Owner & investor reporting

## Fixed Assets & Depreciation

- Asset capitalization
- Depreciation schedules
- Tax advantage optimization
- Disposal and impairment tracking

## Accounts Payable & Receivable

- Invoice processing & vendor payments
- Customer billing & collections
- Cash flow tracking
- AR/AP reconciliations

## Audit & Risk Management

- Internal audit support
- Risk assessments
- Pre-audit preparation
- Compliance documentation

## M&A & Transactional Support

- Due diligence
- Financial modeling for acquisitions
- Post-merger integration accounting
- Asset/liability analysis

## Financial Planning & Modeling

- Cost analysis
- Budget setup & tracking
- Revenue forecasting

## Liquidity Management

- Cash forecasting
- Short/long-term liquidity planning
- Banking relations support

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# Recruitment & Talent Sourcing Support

## Talent Sourcing & Hiring

- Talent identification
- Targeted outreach
- Resume screening
- Candidate shortlisting
- Hiring coordination
- X-ray search

## HR Process Optimization & Compliance

- Payroll coordination
- Job descriptions
- Compliance tracking
- Policy updates
- HR software management
- Database maintenance

## Candidate Management

- Resume evaluations
- Interview scheduling
- Reference checks
- Pre-screening
- Feedback collection

## Onboarding Support

- Paperwork & compliance
- Offer letters & contracts
- Orientation scheduling
- Engagement check-ins
- Benefits coordination

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# Loss Control

## Inspection & Risk Mitigation Support

### Self-Inspections

- System setup & training
- Inspection report review
- Live video chat assistance
- Escalation handling

### Recommendation Management

- Risk mitigation processing
- MGA coordination support
- Carrier communication
- Follow-up tracking & reporting

### Quality Assurance & Compliance

- Pre-submission accuracy audits for reports
- Documentation checks
- Error trend analysis
- Record maintenance

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### Territory & Workload Optimization

- Inspector assignment
- Route optimization
- Real-time workload monitoring
- Capacity planning

### Administrative Efficiency

- Calendar management
- Data entry & report organization
- Define standard workflow
- Stakeholder Communication
- System Documentation

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# Self-Inspections

## Self-Inspection Strategy

The objective is to streamline property inspections for underwriting, aiming to reduce costs while maintaining high accuracy. Key components include:

### ● Clear Inspection Guidelines

Detailed checklists and a guided application ensure consistent, accurate data, utilizing GPS verification.

### ● Mobile Inspection Platform

A digital tool enables real-time data submission, photo uploads, and checklist completion, reducing turnaround times and simplifying data collection.

## Impact

- Over **50% savings** on self-completed inspections.
- **25%+ savings** with video-guided inspections.
- Improved turnaround times.

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## Technology Overview

### ● Control Center

Centralized management of orders.

### ● Inspection Detail Screen

Comprehensive data capture for inspections.

### ● Client Portal

Provides clients access to inspection data, enhancing transparency and communication.

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# Recommendation Management

## Key Features

### ● Customizable Dashboard

Gain full visibility into your work orders with a user-friendly, customizable interface.

### ● Comprehensive Rec Tracking

Manage all client letters (received or created), log important dates for recommendations (rec), and utilise exception reporting.

### ● Automated Notifications

Get reminders and notifications at 30 and 45 days to ensure timely follow-up.

### ● Threaded Recommendations

Organize and track different recommendation threads for easier management.

### ● Volume Scalability

Our system supports high-volume needs and is flexible to scale based on your requirements.

## Service Offerings

### ● Flexibility

Use U.S.-based staff more efficiently and take advantage of time zone differences for overnight work.

### ● Cost Reduction

Save on hiring, training, infrastructure, and technology investments.

### ● Growth

Free up internal staff to focus on building customer relationships and high-value tasks by outsourcing administrative functions to our team.

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# Digital Marketing Services

## Search Engine Optimization (SEO)

- Keyword research & on-page optimization
- Technical SEO audits & site structure improvements
- Backlink strategy development & outreach
- Monthly performance tracking & reporting

## Local SEO & Business Profile

- Business Profile setup & optimization
- Local citation building & directory management
- Review management & response coordination
- Geo-targeted content strategy implementation

## Search Engine Marketing (SEM/PPC)

- Google Ads & Bing Ads campaign setup
- Targeted ad copy creation & A/B testing
- Bid management & budget optimization
- Conversion tracking & ROI analysis
- PPC (pay-per-click) services

## Content Marketing & Graphic Design

- Blog writing, video scripts, & digital development
- Brand-aligned infographics
- Visual content creation
- Email marketing campaign design
- Brand consistency audits across all content
- Web & Email Marketing

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## Affiliate Marketing

- Affiliate program design & network setup
- Relationship management
- Performance tracking & commission audits
- Campaign optimization for revenue growth

## Social Media Marketing

- Platform-specific strategies
- Content calendar development & scheduling
- Engagement analytics
- Audience growth tactics
- Paid social advertising
- Retargeting campaigns
- Digital Advertising

## Online Reputation Management

- Inbound and Outbound calls/emails
- Feedback collection
- Appointment scheduling
- Reminder notifications

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# Customer Service & Email Support



## 24/7 Multichannel Support

- Real-time assistance
- Multilingual support
- Escalation management
- Post-interaction updates

## Documentation & CRM Updates

- Real-time CRM entry
- Detailed interaction logs
- Customer history maintenance
- Status report generation

## Escalation Management

- End-to-end case tracking
- Root cause analysis
- Compliance monitoring
- Escalation mapping

## Customer Outreach

- Inbound & Outbound call/email
- Feedback collection
- Appointment scheduling
- Reminder notifications

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# Back – Office Support

## Document Management

- Calendar management
- Meeting scheduling
- Email & correspondence handling
- Travel coordination
- Expense Reporting
- Meeting minutes & record-keeping

## Underwriting Assistance

- Risk assessment data processing
- System Documentation
- Compliance paperwork
- Manual underwriting review
- Policy Servicing
- Data Migration

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## Data Management & CRM

- Accurate data entry
- Database maintenance
- Real-time CRM updates
- Data cleansing & deduplication
- Custom reporting & analytics

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# IT Solutions

## Web Development Services

- Responsive Website
- Mobile Friendly
- SEO optimization
- Speed Enhancements
- Accessibility Compliance
- Site Maintenance
- Performance Audits
- Security Patches
- E-Commerce Solutions

## Email & Platform Management

- Tools & API Integration
- Multi-Platform Support
- License Management
- Data Recovery
- Security Audits
- Email Configuration & Synchronization
- User Account Setup
- Workflow Automation
- Troubleshooting
- Migrations

## Remote IT Support & Helpdesk

- Password Reset
- Device setup
- Hybrid Setup
- Ticket Management
- Legacy Software Support
- System & Network Diagnostics
- Prepare User Guides
- 24/7 Proactive Monitoring

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