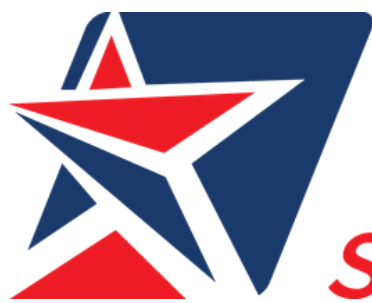




***BACK OFFICE
OPERATIONS
SOLUTIONS TEAM***

SERVICES OVERVIEW

LOSS CONTROL INSPECTION & RECOMMENDATION SUPPORT



BoostRM™ (Recommendation Management)

Track and manage loss control recommendations with structured follow ups, validation, and reporting that keep MGAs and carriers compliant and organized.



Guided Self Inspections

Enable insureds to complete inspections through a simple email link with optional live guidance and inspector escalation when required.



QA for Loss Control Reports

Improve report accuracy and compliance through structured quality review, data validation, and performance monitoring before submission.



Form Building

Design and deploy structured digital forms with conditional logic, testing, and system integration for accurate data capture and smoother workflows.



Territory Manager Support

Coordinate inspection assignments, scheduling, and performance tracking across territories to improve turnaround time and inspection quality.



Loss Control System Integration

Implement and optimize loss control platforms with system setup, workflow automation, data migration, and ongoing technical support.



Recruitment and Talent Sourcing Support

Support hiring teams with structured recruitment operations, candidate sourcing, and administrative hiring tasks.

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SERVICES OVERVIEW

BUSINESS OPERATIONS AND BACK OFFICE SERVICES



Revenue Operations Support

Support the full sales workflow with lead research, CRM management, pipeline tracking, and proposal coordination to keep deals moving forward.



Financial Operations Services

Manage accounting, billing, reconciliation, invoicing, bookkeeping, and payroll processing to maintain accurate and compliant financial operations.



Operational Administration Workflows

Handle data entry, documentation, scheduling, and customer communication to keep daily operations organized and responsive.



Strategic Business Support

Support business growth through operational consulting, virtual assistant services, AI model training support, and digital marketing coordination.

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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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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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QUALITY ASSURANCE

Report Review & Verification

- Pre-Submission Checks
- Data Validation
- Compliance Review
- Quality Scoring

Documentation & Compliance Management

- Report Organization
- Compliance Paperwork
- Risk Assessment Verification
- Audit Trail Maintenance

Process Optimization & Error Reduction

- Error Identification & Correction
- Standardized Protocols
- Template Compliance
- Performance Metrics

Inspector Performance & Quality Training

- Performance Tracking
- Feedback & Coaching
- Training Development
- Standards Enforcement

Claims Processing Support

- Report Organization
- Timeline Acceleration
- Decision Support
- Team Coordination

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Form Building

Requirement Gathering

- Stakeholder interviews
- Field mapping & logic planning
- Data dependency documentation

Form Design & Configuration

- Form layout structuring
- Field type setup (dropdowns, text, etc.)
- Conditional logic & validation rules

Platform Integration

- Workflow linkage
- Role-based access setup
- Availability triggers



Testing & QA

- Field behavior validation
- Dry runs with test data
- QA sign-off documentation

Deployment & Support

- Live publishing with version control
- User communication & demo sessions
- Feedback-driven updates

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TERRITORY MANAGER

Work Assignment & Management

- Inspection assignment across available inspectors
- Optimized scheduling for faster turnaround
- Real-time work tracking
- SLA compliance monitoring

Work Quality Monitoring

- Quality review of inspection reports
- Root-cause analysis on delays
- KPI tracking by inspector
- Performance feedback
- Trend identification across territory

On-Time Delivery Assurance

- Deadline monitoring and alerts
- Early intervention on delays
- Bottleneck resolution
- SLA compliance
- Escalation protocols

Negotiation Support

- Cost and performance tracking
- Negotiation data analysis
- Lower-cost resource recommendations
- Profitability monitoring
- Pricing comparison by inspector

Network Capacity Management

- Capacity assessment
- Workload surge recommendations
- Resource optimization
- Balanced work distribution
- Utilization reporting

Inspector Performance Review

- Underperformance identification
- Quality standard flagging
- Recruitment and onboarding support
- Network quality maintenance
- Replacement recommendations

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LOSS CONTROL SYSTEM INTEGRATION

System Implementation & Setup

- Platform Assessment
- Configuration & Deployment
- Data Migration
- Training & Onboarding

Workflow Automation & Optimization

- Process Mapping
- Automation Rules
- Integration Connections
- Performance Monitoring

Integration Maintenance & Enhancement

- Ongoing Monitoring
- Enhancement Planning
- Compliance Updates
- Vendor Coordination

System Support & Troubleshooting

- Technical Support
- User Support
- System Updates
- Performance Optimization

Data Management & Reporting

- Data Structure
- Report Generation
- Data Analytics
- System Maintenance

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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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REVENUE OPERATIONS SUPPORT

CRM Management & Pipeline Tracking

- CRM Data Entry & Updates
- Pipeline Tracking & Reporting
- Opportunity Management
- Sales Activity Monitoring

Lead Research & Data Enrichment

- Prospect Research
- Lead Qualification Support
- Contact Data Enrichment
- Target Account Identification

Estimates & Proposal Support

- Proposal Preparation
- Pricing & Estimate Coordination
- Document Formatting & Review
- Client-ready Proposal Packages

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Workflow Coordination & Follow-ups

- Sales Task Coordination
- Follow-up Scheduling
- Meeting & Communication Tracking
- Internal Handoff Management

Sales Process Optimization

- Data Accuracy & CRM Organization
- Streamlined Sales Workflows
- Improved Team Collaboration
- Efficient Opportunity Progression

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FINANCIAL OPERATIONS SUPPORT

Accounts Payable & Purchase Order Management

- Vendor Invoice Processing
- Purchase Order Administration
- Payment Authorization Support
- Vendor Account Reconciliation

Invoice-to-Cash Management

- Invoice Processing & Distribution
- Payment Collection Coordination
- Receivable Reconciliation
- Cash Flow Tracking

Payroll Entry & Administration

- Timesheet Verification
- Gross-to-Net Payroll Calculations
- Payroll Deductions Management
- Compliance-Focused Payroll Processing

Accounting & Billing Solutions

- Premium Accounting Management
- Commission Tracking & Processing
- Financial Reconciliations
- Regulatory Financial Reporting

Bookkeeping & Staff Accountant Services

- General Ledger Maintenance
- Month-End Closing Support
- Financial Statement Preparation
- Business Performance Reporting

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OPERATIONAL ADMINISTRATION WORKFLOWS

Operational Administration Workflows

- ERP System Administration
- Data Entry & Data Validation
- Document & Records Management
- Database Updates & Maintenance
- Workflow Coordination & Task Tracking

Administrative Back Office Support

- Document Preparation & Processing
- Record Keeping & File Organization
- Bookkeeping Coordination
- Payroll & Scheduling Support
- Internal Reporting Assistance

Demand Spike Administrative Support

- Rapid Resource Deployment
- Temporary Workflow Support
- Backlog Processing
- Documentation Management
- High-Volume Task Handling

Customer Service & Contact Center Support

- Phone & Email Support Management
- Customer Inquiry Handling
- Ticketing & Case Management
- Follow-Up & Response Coordination
- Service Experience Monitoring

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STRATEGIC BUSINESS SUPPORT

AI & Machine Learning Model Training

- Model Development Support
- Data Preparation & Labeling
- Training & Optimization
- Predictive Insights Integration

Virtual Assistant Services

- Administrative Task Management
- Calendar & Meeting Coordination
- Email & Communication Support
- Document & Workflow Assistance

Digital Marketing Services

- SEO (Inclusive of AEO / GEO / LLMO)
- PPC / SEM (Google / Bing / Meta Ads)
- Social Media Optimization
- Content Writing
- Graphic Designing & Branding
- Online Reputation Management
- Affiliate Marketing
- Website Development & Maintenance

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