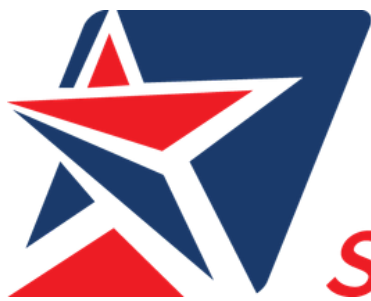




***BACK OFFICE
OPERATIONS
SOLUTIONS TEAM***

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

Smarter recommendation tracking with AI-assisted workflows, automated follow-up, and clear visibility from inspection to closure.



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.



AI-Enabled Scalability

Our system supports high-volume needs with AI-assisted processes 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 using AI-assisted workflows and our experienced insurance operations team.

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Questions? Let's Talk.

Joe Drozda

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Self-Inspections

*Guided Inspections. Better Data.
Faster Turnaround.*

Streamline property inspections with guided inspection tools that deliver accurate data, lower costs, and faster turnaround.

Key Features



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.



AI-Assisted Quality Review

AI checks help identify incomplete or inconsistent inspection data before underwriting.

Impact

- Over 50% savings on self-completed inspections.
- 25%+ savings with video-guided inspections.
- Improved turnaround times.
- Reliable, audit-ready inspection data.

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.



Guided Video Support

Provides live guidance when additional assistance is needed to complete the inspection.

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AI-Powered QA

AI-powered quality assurance that combines AI review with human expertise to deliver accurate, verified inspection data and support fact-based underwriting decisions

Key Features



AI-Powered Report Review

Review every inspection form and photo for missed damage, inconsistent information, and unsupported recommendations before submission.



Photo-to-Form Verification

Cross-check inspection answers against property photos to identify contradictions and ensure the report reflects the actual condition.



Human-Verified QA

AI flags potential issues, while qualified loss-control experts confirm, correct, or dismiss every finding.



Client-Specific Rules

Apply your inspection standards and rules automatically across every inspection order.



Performance Scorecarding

Track program, client, and inspector-level QA trends to identify recurring errors and improve report quality.



Scalable QA

Handle growing inspection volumes with 24/7 QA capacity without adding equivalent internal headcount.



Service Offerings

Managed QA Service

We run QA for you.

Our loss-control experts operate the AI QA Agent on your inspection reports and return clean, underwriter-ready files.

- Faster, more accurate QA
- 24/7 capacity that flexes with volume
- 50–60% less than an internal QA hire
- Program and inspector-level scorecards

License the AI QA Agent

Put the agent in your team's hands

Deploy the AI QA Agent inside your existing environment so your QA team can review faster and catch more, while your reviewers make the final call.

- Accelerate your QA team
- Run inside your existing workflow
- Scale without adding reviewers
- Your rules, your environment, full audit trail

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Form Building

Build customized forms around your specific workflows, with structured configuration, seamless integration, and AI-assisted verification to help ensure accurate field behavior and logic.

Key Features



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

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Testing & QA

- AI verification of field logic
- 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

*Smarter Territory Management.
Better Operational Control.*

Experienced Territory Managers supported by AI and task-management tools to improve speed, visibility, accuracy, and workload management.

Key Features



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

Technology Overview



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



Negotiation Support

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

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LOSS CONTROL SYSTEM INTEGRATION

*Connected Workflows.
Better Operational Control.*

Operates directly inside your existing loss control and insurance systems, keeping workflows moving while improving speed, visibility, and accuracy.

Key Features



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

Technology Overview



System Support & Troubleshooting

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



Data Management & Reporting

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



AI VERIFICATION LAYER

Automated checks help catch errors before they reach your system of record.

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REVENUE OPERATIONS SUPPORT

*Smarter Revenue Operations.
Better Operational Control.*

Revenue operations support enhanced with AI and task-management tools to improve data accuracy, workflow visibility, and sales process efficiency.

CRM Management & Pipeline Tracking

- CRM Data Entry & Updates
- Pipeline Tracking & Reporting
- Opportunity Management
- AI-Assisted 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

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

*Accurate Financials.
Stronger Business Visibility.*

Streamlined financial operations supported by technology and AI-assisted processes to improve accuracy, efficiency, and financial workflow visibility.

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

*Streamlined Workflows.
Reliable Administrative Support.*

Administrative workflows supported by technology and AI-assisted processes to improve accuracy, responsiveness, and operational efficiency.



Operational Administration Workflows

- ERP System Administration
- Data Entry & AI-Assisted 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

*Strategic Expertise.
Technology-Driven Business Support.*

Strategic business support combining AI, technology, and skilled resources to improve efficiency, decision-making, and business performance.

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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INSURANCE BUSINESS PROCESS OUTSOURCING

Insurance-focused BPO with AI-assisted workflows that improve efficiency, reduce costs, and scale operations.

Key Features

- **Insurance Industry Expertise**
Experienced teams supporting insurance workflows, systems, and compliance requirements.
- **AI-Assisted Operations**
AI-enabled workflows help streamline repetitive tasks and improve processing consistency.
- **End-to-End Support**
Policy administration, claims, loss control, billing, documents, customer service, and QA.
- **Scalable Support**
Flexible resources that adjust to workload demands and business needs.
- **Quality & Security**
Documented processes, AI-assisted QA, SOC 2 Type 2 and ISO 27001 certified operations.

KEY RESULTS

- **50%+ Cost Savings**
- **24/7 Operational Support**
- **Faster Turnaround**
- **Scalable Capacity**
- **AI-Assisted Workflows**
- **Consistent Quality**

Service Offerings

- **Operational Efficiency**
Streamline repetitive work and improve turnaround times with specialized teams and AI-assisted workflows.
- **Cost Reduction**
Reduce staffing and operational overhead while maintaining consistent service quality.
- **Scalable Growth**
Increase capacity, manage higher volumes, and keep internal teams focused on strategic priorities.

INSURANCE SERVICES

- **Policy Administration**
- **Claims Processing**
- **Loss Control & Underwriting**
- **COI & Document Services**
- **Billing & Collections**
- **Customer Service**
- **Data Entry & Order Management**
- **AI-Powered QA & Reporting**

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Recruitment & Talent Sourcing Support



Talent Sourcing & Hiring

- Talent identification
- Targeted outreach
- AI-assisted talent identification
- 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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