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Policy Checking – challenges and solutions

Challenges



Complex & Dynamic Tasks

Highly complex tasks require deep expertise and the ability to adapt quickly.



Short Turnaround Time

To ensure an exceptional client experience, we committed to delivering high-quality results within very tight timeframe.



High Volume of Tasks

The sheer volume of incoming tasks demanded efficiency and scalability to maintain consistent service quality.

Solutions: A Three-Pronged Approach



Expert Team

Leveraged our team of seasoned experts and SMEs, cultivated over years, to tackle complex tasks with prevision.



Robust Technology Tools

Harnessed robust tools and technologies to enhance our speed, accuracy, and overall efficiency. Deployed Account Manger Portal (AMP).



Continuous Insights

Actively sought and incorporated client feedback to refine our processes, ensuring consistently superior insights, including our Leaders Analytics Dashboard.

Policy Insights service is not just a policy checking solution, but a strategic enabler. By combining professional expertise, robust tools and data insights, we optimize operations, fulfill diverse client needs and deliver actionable advice, ultimately enhancing management and achieving mutual success.

Policy Insights onboarding for Alliant

January 2026: Steady stage,
quick ramp-up, easy adoption

September 15, 2025: Service Started

- Planned: 6 months ramp up to 2,600+ policies/month
- Actual: Achieved 140% of planned volume just in 2 months

October: AMP Training

- Enrolled 900+ AMP users
- Conducted 10+ live AMP training sessions

December: Backlog Clearance

- Supported 3 operating groups on backlog clearance
- Cleared a total of 3,200+ backlogged policies within 2 months

November: Work Expansion

- 12 operating groups with 76 offices are enrolled into PI
- 500+ AM/AAMs are active users



Policy Insights experience for Alliant

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50%

Account
Premium >
\$100K

700+

Carriers

50+

Line of
Business

4-5

of Source
Docs/Policy



Tech-enabled policy checking tools support people in processing complex and extensive policy documents efficiently, enabling fast, accurate and consistent validation.



Dedicated policy checking team delivers deep domain expertise, and proven best practices across 90+ clients to ensure accurate, reliable, and high-quality policy validation.



Actionable insights from deep analytics deliver management-focused guidance, enabling leaders to drive compliance excellence, and optimize operational oversight.

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