

Exari Policy Checking

Insurance solution for brokers and agents

Insurance firms are constantly receiving new applications from their agents as well as numerous renewal requests. Some of these documents come with missing information, which can consume valuable time chasing multiple clients and agents.

Exari's Policy Checking solution allows brokers and agents to complete timely and consistent policy reviews, minimize errors and omissions and ensure that they deliver the best possible coverage to their clients.

Benefits	Key Capabilities
<p>Speed up policy reviews Manual policy checking is a tedious and error-prone process. Speed up your policy checking and deliver the finalized policy review within required industry and company standards.</p>	<p>Compare policies Quickly compare up to five documents side by side in their original format to identify differences wherever they exist.</p>
<p>Minimize policy backlog Risk often goes unchecked as new policies continue to pile up. Keep up with policy checking demands whatever your size, and deliver on your promises to your clients.</p>	<p>Apply a set of standard and line-specific checks Run checklists that address common causes of errors and omissions. As an additional option, brokers / agents can use checks (maintained by Adsensa) from 18 specific lines of business e.g. D&O. After applying the checks, quickly jump to the relevant policy wording for review.</p>
<p>Minimize errors and omissions Don't let costly discrepancies slip into your client's policies. Create a checklist for automated support in identifying areas of concern and correcting them.</p>	<p>A cloud-based solution No infrastructure investment is necessary with a cloud-based solution, so you're up and running quickly.</p>
<p>Policy support from start to finish Manage the policy checking process through various stages of approval until completion. Use commenting capabilities to help track and resolve open issues for individual or team reviews.</p>	<p>Create a single source of truth for your policy review Create an audit trail of your policy review, including all identified discrepancies and resolutions. Save the results in Exari's Contract management system for automatic renewal alerts.</p>

ABOUT EXARI

Exari delivers the most complete Enterprise Contract Lifecycle Management platform, used every day by market-leading companies to understand all aspects of their contract ecosystem worldwide. With Exari, customers can reduce contract risk and improve operating efficiency with 100% Contract Certainty™.

