|  |  |
| --- | --- |
| **COMPANY NAME:** | [Enter company name here] |
| **LOGO:** | [paste logo / image here] |

**BACKGROUND INFORMATION:**

|  |  |
| --- | --- |
| **Address:** |  |
| **Phone Number:** |  |
| **Website:** |  |
| **Senior Executive:** |  |

**In Force Policy Count by Line of Business:**

|  |  |
| --- | --- |
| **Farm / Farm Owners:** |  |
| **Commercial:** |  |
| **Homeowner:** |  |
| **Personal Auto:** |  |

**Top 3 Lines of Business by Premium Volume:**

|  |  |
| --- | --- |
| **Line of Business** | **Direct Written Premium** |
|  |  |
|  |  |
|  |  |

|  |  |
| --- | --- |
| **Agency Force Size**  **(Captive / Independent):** |  |
| **Number of Offices:** |  |

**TOP PROJECTS/ INITIATIVES (with brief description if needed):**

**Current Year (2023)**

* 1
* 2
* 3
* 4
* 5

**Next Year (2024)**

* 1
* 2
* 3

**OPERATIONAL AREAS / STRUCTURE & OWNERSHIP:**

|  |  |  |
| --- | --- | --- |
| Operations / Function | Owner / Contact Info or NA | Areas of Responsibility / Description |
| Example / Sample | First Last Name / [first.last@domain.com](mailto:first.last@domain.com) | Has 4 FTEs focused on helping define the example for others to follow; |
| Agency Support |  |  |
| Billing Support |  |  |
| Business Analysts / Product Owners |  |  |
| Client Advocacy / Complaints |  |  |
| Collections |  |  |
| Contact / Call Center / Customer Support |  |  |
| Imaging |  |  |
| IT Support / System Testing / User Acceptance Testing |  |  |
| Mailing / Mailroom |  |  |
| Payment Processing / Accounts Receivable |  |  |
| Policy Support / Policy Services / Policy Processing |  |  |
| Printing |  |  |
| Project Management Office (PMO) |  |  |
| Records |  |  |
| Robotic Process Automation |  |  |
| Training |  |  |
| Underwriting |  |  |
| Word Processing / Document Services |  |  |

**PROCESSING SYSTEMS**

|  |  |  |  |
| --- | --- | --- | --- |
| Function | Software | Vendor  (or “in-house”) | Lines of Business |
| Billing System |  |  |  |
| Policy System |  |  |  |
| Claims System |  |  |  |
| Imaging / Workflow Management |  |  |  |
| Document / Print Processing |  |  |  |
| Content Management |  |  |  |
| Intranet |  |  |  |
| Payment Processing |  |  |  |
| E-Sign Processing |  |  |  |
| Customer Relationship Management |  |  |  |
| ERP |  |  |  |
| Data Warehousing / Reporting |  |  |  |
| Robotic / Automated Processing |  |  |  |
| Agent Portal |  |  |  |
| Other |  |  |  |
| Other |  |  |  |

**3rd PARTY DATA / SOLUTION PROVIDERS**

|  |  |  |
| --- | --- | --- |
| Function | Provider | Lines of Business |
| Auto Motor Vehicle Reports |  |  |
| Auto Symbol / VIN Verification |  |  |
| Claims |  |  |
| Data Prefill |  |  |
| Lender / Mortgagee Notices |  |  |
| Coverage Verifier |  |  |
| Insurance Scores |  |  |
| Payment Processor |  |  |
| Banking / Lockbox / ACH |  |  |
| Collections |  |  |
| UBI / Telematics |  |  |
| Teleconference / Collaboration |  |  |
| Print / Mail |  |  |
| Roadside Assistance |  |  |
| Other |  |  |
| Other |  |  |

**PROCESSING EQUIPMENT / HARDWARE**

|  |  |
| --- | --- |
| Function | Hardware |
| Call Center Phone System |  |
| Check Processing |  |
| Imaging/Scanning |  |
| Mail Processing |  |
| Printer / Color Printer |  |
| Other |  |