FluidTasks

UNDERWRITING DATA SHEET

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UNDERWRITING

Deliver a seamless and guided underwriting process that caters to the specific needs of underwriters ensuring an effortless and highly efficient experience.

As the demands for customized and personalized experiences, transparency, efficiency, and consistently outstanding customer service continue to rise, FluidTasks Underwriting establishes a robust foundation for not only meeting these needs today but also exceeding them for years to come.

With our innovative approach, we empower underwriters to deliver tailored experiences, foster transparency, drive efficiency, and consistently provide exceptional customer service in the industry.

Unlock Enhanced Efficiency for Underwriting Processes

In today's fast-paced insurance landscape, efficiency is paramount to success. Manual underwriting processes are time-consuming, error-prone, and hindered by repetitive tasks. To overcome the challenges, underwriting software emerges as the game-changer, empowering insurers to streamline operations and achieve unparalleled efficiency.

FluidTasks underwriting simplifies the process of capturing insurance applications and risk information required to assess client exposure and make an informed decision about the most suitable coverage that meets customer needs. This information is stored in a format that facilitates information exchange between different parties responsible for delivering services to policyholders.

Because the amount of information that must be captured when quoting and binding a policy can be enormous, FluidTasks Underwriting provides an intuitive step-by-step process that makes it easier for brokers and underwriters to collect this data through standardized industry forms.

BENEFITS

- **Consistency and Standardization**
- **Scalability and Adaptability**
- **Cost Savings**

FEATURES

- **Analytics and Reporting**
- **Guided Underwriting**
- **Compliance and Audit Trails**

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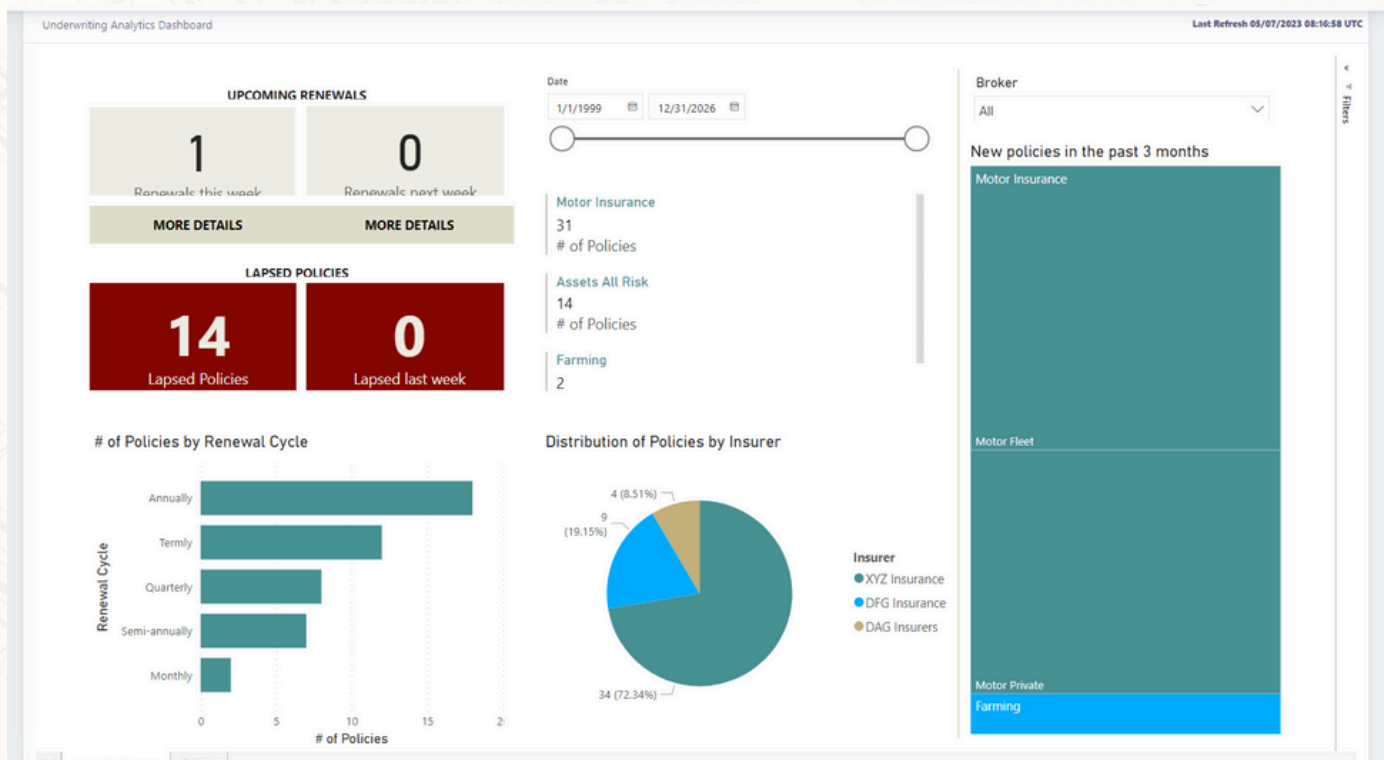# ANALYTICS AND REPORTING

WHAT YOU GET

- **Real Time Insights**
- **Performance Monitoring & Analytics**
- **Interactive Dashboards**

In the dynamic world of insurance underwriting, access to timely and accurate information is crucial. Traditional manual reporting methods often result in delayed insights, hindering decision-making and impacting overall efficiency.

Introducing our Underwriting Dashboard, a powerful tool that revolutionizes data visualization and empowers underwriters with real-time insights. Stay ahead of the competition and make informed decisions that drive success.

The Underwriting Dashboard provides a comprehensive and intuitive visual representation of key underwriting metrics and performance indicators. Instantly access real-time data on policies written, premiums generated, and other critical underwriting data.

Monitor underwriting performance at a glance with our advanced analytics capabilities. Track key performance indicators (KPIs) such as policy renewal rates. Identify trends, patterns, and outliers to identify areas of improvement and capitalize on growth opportunities.

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A CONSISTENT STEP BY STEP PROCESS

Underwriters often encounter multiple challenges that significantly impact the efficiency and effectiveness of the underwriting process. Issues such as time-consuming tasks, increased error risks, inaccurate rates leading to incorrect quotations, and the possibility of omitting crucial information can hinder operations.

Using FluidTasks guided underwriting, these challenges are effectively addressed. Our intuitive and user-friendly forms simplify data entry, saving valuable time. Pre-configured rates ensure consistency in quoting and billing, eliminating errors.

Step-by-step guidance minimizes mistakes, providing a structured approach to risk evaluation. Seamless integration with file management services reduces the risk of omissions.

Additionally, collected underwriting data is readily accessible to stakeholders so that they can work together seamlessly which improves operational efficiency.

BENEFITS

- **Intuitive time saving forms**
- **Pre-configured Rates**
- **Enhanced collaboration and communication**

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COMPLIANCE AND AUDIT TRAILS

Compliance with industry standards and the ability to maintain comprehensive audit trails are paramount. Our underwriting reporting features provide a robust solution for ensuring transparency, accountability, and regulatory adherence within your business operations.
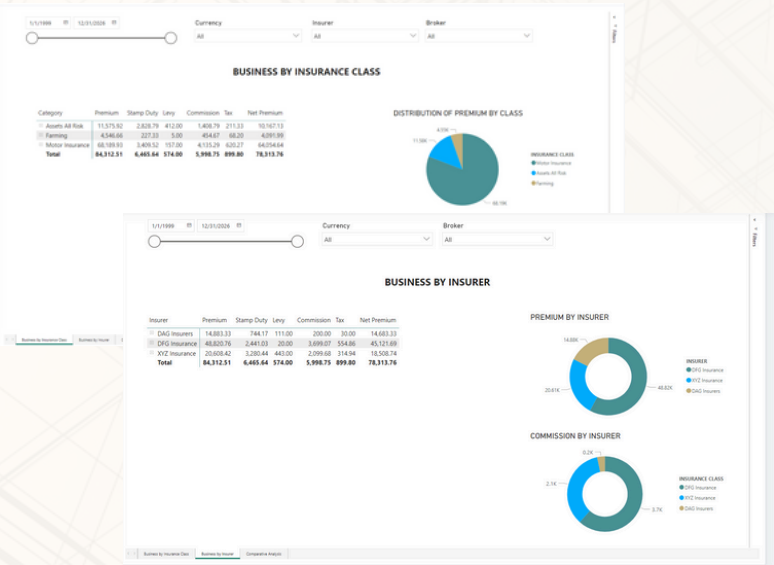
With a range of powerful reporting capabilities, including bordereaux, business by insurer, and business by class, business by product reports, you can confidently navigate regulatory requirements and optimize your underwriting operations.

FluidTasks tracks and documents every action within the underwriting operations. It captures and stores detailed logs of user activities, system events, and data changes. This allow organizations to maintain a complete historical record of underwriting events, ensuring transparency and accountability.

This provides a bedrock to meet regulatory requirements and industry standards as well as generate reports that facilitate compliance with regulations such as data protection, risk management, and industry-specific guidelines. Using FluidTasks Underwriting, you can demonstrate adherence to regulatory obligations through audit trails and detailed reports.

BENEFITS

- **Comprehensive Audit Trails**
- **Regulatory Reports**
- **Reports**

FluidTasks is unified & cloud-based insurance platform that enables insurers, MGAs and brokers to focus on their competencies by leveraging pre-built digital solutions.