

# EASY TO USE TECHNOLOGY

The screenshot displays the CASE system interface. At the top, it says 'CASE Comparative Assessment Self Evaluation'. Below this, there's a table of 'Contractor-GL1 Clients' with columns for 'Policy #', 'Status', and 'Policy Period'. The table lists several contractors, including 'AGUILAR & SONS MASONRY'. Below the table, there's a 'CASE System - CONTRACTOR-GL1 Self Evaluation Form for: AGUILAR & SONS MASONRY'. The form includes a 'DONE' button and a section for 'HDC paper test bubbles' with 'Yes/No' and 'Documents?' columns. At the bottom, there's a section for 'Upload or fax in 941 Quarterly Federal wage reports or payroll services for the policy period.' with 'upload' and 'view' buttons.

CASE's easy to use interface caters to the policyholder and the underwriter, giving the policyholder the ability to complete the audit in the comfort of their home. Should a policyholder or underwriter not be technologically inclined they can call CASE and speak with a real person and get the help they need.



## What CASE Can Do For You

Lowest cost in the industry on failed audits and competitive costs on larger, more complex audits.

Avoidance of premium compromise from lack of immediately available documentation

Getting it right the first time, avoiding policyholder frustration

Reduced time spent on audit processing and negotiation

Customized approach to the insurers' specific audit needs, filling transparency gaps

Fewer negotiated "discounts" on outstanding audits

Shorter time between audit endorsements processing and cash collection

Flexibility to customize audit approach to your specific needs

Improved policyholder audit participation

### Policyholders Can Send Requested Information

- Web Upload
- Regular Mail (USPS, UPS, FedEx, Etc.)
- Fax (866-531-6456)
- Email (sam@case-audit.com)



## FOCUS

F – Field

O – Observations

and

C – Collaboration

for

U – Underwriting

S – Success

www.casefieldservices.com

1-866-529-0850

# Social Media

CASE Field Services uses multiple social media sites to not only advertise CASE, but gain valuable insight into the needs of the policyholders and insurance carriers. All the social media sites used by CASE are hosted by Sam Case, a commendable representation of our friendly staff. These sites include, but are not limited to: Facebook, Linked-In, Twitter, Manta, and YouTube.



[www.casefieldservices.com](http://www.casefieldservices.com)

## Why CASE Over Other Field Services Companies?

CASE's unique approach to the field services of loss control and audit can challenge what is normally an underwriting expense. Loss control has typically escaped measured effect with the paradigm, "Our success is best measured when nothing happens...." Audit's expense is more sensitive as the cost can't be directly passed through to the policyholder. As a result, nominally administrated audits are typically utilized to minimize expense and avoid policyholder upset. Some carriers have even tried to package audits as a form of policyholder services and, as a result, tend to see exacerbated return premiums far exceeding additional premiums.

CASE's integrated approach to field services can turn an underwriting expense into a profit center. The loss control service includes elements beyond essay, but instead is tailored to the carrier specific underwriting objectives in a data driven format with referencable supporting documentation, beyond photographs. As part of the approach is a verification of deposit and historical exposures in addition to questions as to the qualitative aspects of the policyholder's business practices, the loss control service effectually sets up the audit after the policy year is concluded.

### What Does This Mean?

- 1) Underwriters will have the information and supporting documents needed to confirm their decision to stay on or get off of a risk.
- 2) Opaque marketing channels will be exposed quickly before too many policyholders injure loss results.
- 3) Qualified policyholders will be better proven and accepting of the verified document requirement.

- 4) Audits will be seen by the policyholder as a continuation of the underwriting approach and see little if any contest during a growing economy, the impact on underwriting results could be substantial:

- 10% Early Cancel after Loss Control
- 10% Increased Basis after Loss Control
- Productive Audits that are 500%+ ROI on the FOCUS expense

Implementation of the FOCUS approach may not be for every carrier. Some insurers need to avoid any marketing conflict whatsoever to meet growth goals. Some underwriting teams are not intended to filter business out, but rather filter policyholders in. Some carriers see loss control and audit as policyholder services only and are not willing to see accuracy as the primary objective. If you want to FOCUS on profit through accuracy and verifiable documentation, then CASE might be the right fit for you. By tailoring a custom approach and showing you how to measure ROI on field services, your outlook on field services can change in as little as 90 days.