



XDimensional Technologies Consulting Services: Agency Accounting & Operations Consulting

XDimensional Technologies understands the opportunities associated with getting the most out of your agency management platform. Our team of consultants has the industry expertise to analyze and provide recommendations for the appropriate Nexsure Accounting and General Ledger setup, and operational controls, that will make your organization an efficient entity, with the ability to manage your bottom line.

A Project Management Approach to Consulting

XDimensional Technologies (XDTI) Consulting helps agencies manage the scope, timing, execution, and measurement of the change associated with the implementation of an agency management platform. XDTI Consulting provides insight to help agencies improve business processes for greater efficiency and profit. This Project Management approach helps solve agency workflow and technology challenges, assisting in the implementation of new agency strategies.

Operations, Best Practices & Technology

XDTI Consulting uniquely understands the interconnectedness of insurance agency operations, agency best practices and technology. We support our agency clients in the configuration, implementation and optimization of the Nexsure platform to maintain and maximize workflow efficiencies, processes, solve technology challenges and implement new strategies, ultimately making our clients more efficient and profitable.



Examples of XDTI Consulting Engagements

XDTI Consulting approaches every project with a specific outline and agreement of what the engagement entails and what objectives will be achieved. A few examples include (i) Book of Business analysis and meaningful reporting to help identify current premium volumes and corresponding commission/income volume and resource workloads; (ii) a comprehensive review of the complexity of customers, policies, and Lines of Business (LOB's) which help to ensure that current work levels are evenly distributed amongst the staff; (iii) Monthly / Quarterly procedure audits to provide Management with the necessary confidence that the staff members are following the agency's established standards and workflows. Such workflow and efficiency audits will assist in uncovering potential training issues and performance issues based on the results.

XDTI Consulting Delivers Exceptional Analysis & Optimization Services

AGENCY ACCOUNTING & OPERATIONS CONSULTING

XDTI Consulting will provide an assessment of your management and accounting processes and procedures. We will develop an action plan to help protect your agency against inefficiencies and costly time-consuming processes.

- + Review and Analyze Accounting Reports
- + Review Management and Accounting Reports that are commonly used in an Agency
- + Assess Month End and Year End Processes
- + Assess current Accounting Structure for continuity with Agency Operations
- + Assess Reconciliation Processing for both Agency and Direct Bill
- + Executive Review to outline the findings of the Analysis
- + Detailed Action Plan to include recommendations to ensure Efficiencies of the Accounting Processes

To learn more about **XDimensional Technologies Consulting Services**, or the **Nexsure Agency Management Platform**, please contact the Sales Department at nexsuresales@xdti.com or **800-789-2567**.