XDimensional Technologies Consulting Services: Quality Assurance & Efficiency Assessment Consulting

The Nexsure Agency Management Platform is a powerful and flexible tool, and must be utilized properly in order to realize its full potential. A Quality Assurance Assessment of your agency's efficiencies will help to ensure goals are met, and our team of veteran consultants has the expertise to analyze and provide recommendations to get the most out of your technology investment. XDTI Consulting will help ensure that your staff is achieving expectations, leading to increased customer satisfaction.

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 Delivers Exceptional Agency Service Operations Consulting

CUSTOMIZATION & UTILIZATION OF NEXSURE

XDTI Consulting assesses your agency's current utilization of Nexsure to ensure the system is being used to its potential:

- Agency / Carrier Interface - Download Utilization Assessment (Personal Lines, Commercial Lines, Commissions, eDocs)
- Security Administration (Security Policy, User Rights Templates, Transaction Log)
- Lookup Management (Classifieds, Related Accounts, Certificates' Description of Operations Library)
- Managing Lines of Business
- Managing Actions (Action Plans, Alerts, Links, Reporting)
- Delivery Templates (Customization & Utilization)
- Form Letters & Proposals

QUALITY ASSURANCE & WORKFLOW ASSESSMENT

XDTI Consulting can provide a quality assurance program, or an assessment of current agency service standards and workflows:

- Standardization of Naming Conventions (Actions, Attachments, Delivery, Accounting)
- Utilization of Service Automation (*if applicable*), including Client Portal, Notifications, Custom Web Forms, Leads Management, and Docusign Integration
- Action Plan provided to include details of how the Agency can optimize Agency Best Practices and Utilization of the Agency Management Platform
- Provide assistance regarding effective strategies to audit the system, to ensure adherence to established Workflows and Procedures
- If requested, provide assistance with development of a Workflow Procedure Manual

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**.