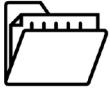


The Evolution of the Loss Control System



No System

- » No "loss control specific" system
- » Defined process, but utilizes Excel, Word, or other manual methods
- » Fully manual, can be difficult to track activities



1st Generation

- » A "loss control system" exists, however it is more of a "task management system"
- » Tasks can be created and tracked, however the specific loss control work is captured in Word/Excel files
- » Typically limited or no automation for the consultant



2nd Generation

- » Data is entered directly into a system, increasing efficiency and reporting capabilities
- » Some level of automation, however IT is required for any ongoing business-driven changes
- » Typically these systems are rarely updated with new functionality as they are difficult/costly to upgrade/keep current



3rd Generation

- » These are fully-automated loss control systems that allow you to manage your book of business, collect loss control data, build service plans, manage recommendations, and more
- » A 3rd generation system constantly evolves over time and provides extreme flexibility to the loss control team to make changes on their own as required

Key Abilities & Benefits	No System	1st Generation	2nd Generation	3rd Generation
Survey & Due Date Tracking	—	—	✓	✓
Planning/Scheduling Tools (ex. Mapping, Calendar Automation)	✗	✗	—	✓
Offline App Available For Field Use	✗	✗	—	✓
Report Writing & Letter Automation	✗	✗	—	✓
Service Plan & Stewardship Capabilities	✗	✗	✗	✓
Recommendation Management and Tracking	✗	—	—	✓
Carrier/Insured Collaboration Via Online Portal	✗	✗	✗	✓
Seamless Integration With Other Internal Teams	✗	✗	—	✓
Tools to Manage Your Team's Workload	✗	—	—	✓
Management Reporting	✗	—	✓	✓
Data Mining and Trend Analysis	✗	✗	✗	✓

✗ = Not Available — = Limited ✓ = Available