



All of the consultants at AB Solutions come from an insurance agency background, and each has a minimum of 20 years experience in Agency Operations. Our work with hundreds of agencies over the span of decades can offer superior perspectives on almost every aspect of your Agency’s operations and automation.

**List of Services that we provide:**

Service	Description
<b>Procedures Development</b>	<p>Create a written procedures manual for any <b>one department</b> in about <b>five business days</b>.</p> <ul style="list-style-type: none"> <li>• Live development Process – We type it up as it is discussed and agreed to by agency staff members.</li> <li>• Process normally involves significant amounts of training/review of Agency Management System functionality as specific topics are discussed / debated during the development process.</li> <li>• Agency management system Activity &amp; Attachment Based</li> <li>• Includes the core procedures like:             <ul style="list-style-type: none"> <li>○ New Business</li> <li>○ Renewal Processing (usually 2 or more for things like marketing of account vs. automatic renewals vs. specialty programs, etc.)</li> <li>○ Endorsements</li> <li>○ Audits</li> <li>○ Cancellations (usually multiples including Insured’s Request, Non-payment, Carrier non renewal, etc.)</li> <li>○ Claims</li> <li>○ Agency Specific recurring items (Loss Control Notice handling, Walk in Cash Receipts, Mail Handling for Front End Scanning)</li> </ul> </li> <li>• Includes Appendices like:             <ul style="list-style-type: none"> <li>○ Screen &amp; Field requirements (Client Detail, Policy, etc.)</li> <li>○ Agency Specific Naming Rules (Customer Coding, History Naming, etc.)</li> <li>○ Etc.</li> </ul> </li> <li>• Modification of your agency management system is done ‘live’ during the 5 day process as those items are discussed:             <ul style="list-style-type: none"> <li>○ Form-letters</li> <li>○ Activities</li> <li>○ Attachment Categories, Sub-Categories, &amp; Default description</li> <li>○ Specialized Transaction Types</li> <li>○ Etc.</li> </ul> </li> <li>• Includes clickable links to “how to” instruction pages if the agency has such workflow documents already purchased or created.</li> <li>• Final manual can easily be saved to Agency Intranet.</li> <li>• The resulting procedures manual is a management tool; a rulebook that lets the staff know the ‘what’ and ‘when’ of your expectations for them.</li> </ul>



Service	Description
<p><b>Quality Assurance Programs</b></p> <p>1 day to do set up and strategy planning – normally included as part of initial procedure development</p>	<p>In order to maximize the return of the agency's investment of procedures and staff training, a formal quality assurance program must be implemented.</p> <ul style="list-style-type: none"><li>• Based upon a written procedures manual.</li><li>• Flexible format that allows for modification of the items to be audited based on the time available to conduct the audit.</li><li>• Training of Agency Personnel on effective strategies for conducting an audit<ul style="list-style-type: none"><li>○ Use of available agency management system reports</li><li>○ Exporting data to Excel for more effective review and distribution</li></ul></li><li>• Numeric scoring based system that allows for charting performance over time.</li></ul> <p><i>If requested, AB Solutions will assume responsibility for conducting and managing your agency's quality assurance program.</i></p>
<p><b>Clean up of the Agency Management System</b></p> <p>3 days 4 days w/ Security Manager</p>	<p>A neat and orderly agency management system is an essential component for maximizing staff productivity.</p> <ul style="list-style-type: none"><li>• All Agency Management System default codes:<ul style="list-style-type: none"><li>○ Activities</li><li>○ Attachment categories</li><li>○ CSR's</li><li>○ Policy Types</li><li>○ Statuses</li><li>○ Etc.</li></ul></li><li>• Form-letters &amp; Proposals</li><li>• Companies, Producers, Certificate Holders, etc.</li><li>• Strategies for maintaining Clients &amp; Policies</li><li>• Security Manager</li><li>• On site or remote clean up options are available</li></ul>
<p><b>Staff Training</b></p> <p># of days varies based on training options selected.</p>	<p>Operational efficiencies cannot be realized or maintained without ongoing training on the best ways to utilize agency automation resources.</p> <ul style="list-style-type: none"><li>• New User<ul style="list-style-type: none"><li>○ Service Staff</li><li>○ Producers</li><li>○ Accounting</li><li>○ Agency Management System Administration</li></ul></li><li>• E-filing / Front End Scanning</li><li>• Reports</li><li>• Utilization of integrated Microsoft Office products<ul style="list-style-type: none"><li>○ Word</li><li>○ Excel</li><li>○ Outlook</li></ul></li><li>• Review of software updates</li><li>• On site or remote training options are available</li></ul>



<b>Service</b>	<b>Description</b>
<b>Accounting</b>	<p>For any business to succeed over the long term, accurate financial records are not optional.</p> <ul style="list-style-type: none"><li>• Training of Accounting Staff</li><li>• Clean up of problem areas<ul style="list-style-type: none"><li>○ Company Payables</li><li>○ Accounts Receivables</li><li>○ Producer Payables</li><li>○ Etc.</li></ul></li><li>• Set up of the Agency Management System<ul style="list-style-type: none"><li>○ General Ledger</li><li>○ Format of Financial Statements</li><li>○ Entry of budget figures</li><li>○ User Defined Transactions</li><li>○ Month end options</li><li>○ Recurring Journal Entry</li></ul></li><li>• Accounting Reports<ul style="list-style-type: none"><li>○ 'Canned' management system reports</li><li>○ Custom Agency defined reports</li></ul></li><li>• Month End / Year End processing</li><li>• Reconciliations<ul style="list-style-type: none"><li>○ Agency Bill</li><li>○ Direct Bill</li><li>○ Check Book</li></ul></li><li>• Invoicing workflows for entry personnel</li></ul>
<b>Outsourced Accounting</b>	<p>If the time and expense required to have well trained in-house accounting staff is too high, we can take over the routine handling of the more difficult accounting tasks for your agency.</p> <ul style="list-style-type: none"><li>• Month End / Year End processing<ul style="list-style-type: none"><li>○ Generate Reports</li><li>○ Look for problems / issues</li><li>○ Prepare summary report for agency ownership</li></ul></li><li>• Reconciliations<ul style="list-style-type: none"><li>○ Agency Bill</li><li>○ Direct Bill</li><li>○ Check Book</li></ul></li><li>• Training on how to perform routine accounting functions for agency entry personnel (those tasks which someone on the agency side will still need to enter)<ul style="list-style-type: none"><li>○ Invoicing</li><li>○ Deposits</li><li>○ Entry and printing of operating checks</li></ul></li></ul>



<b>Service</b>	<b>Description</b>
<b>Proposals &amp; Form-letters</b>	<p>Integrated Proposals and Form-letters will save your staff significant amounts of time as well reduce the agency's E&amp;O exposure. Creating documents by "hand crafting" requires stupid amounts of time and effort. And simply copying such documents from a prior period or from a different account and then revising the specific content creates a significant E&amp;O exposure.</p> <ul style="list-style-type: none"><li>• Formatted as per agency specifications. Fonts, colors or images can all be set up to match the agency's preference.</li><li>• Integrated with your Agency Management System – so the data in the applications pulls through to the documents and the completed Word document is attached to the Client file.</li><li>• Advanced utilization of Word functionality:<ul style="list-style-type: none"><li>○ If statements to modify the output based upon client data - So the same document will come out differently for an Agency Bill vs. a Direct Bill policy, or checking for missing information on an application, etc.</li><li>○ Number formatting – so amounts always have commas or dollar signs if desired</li><li>○ Capitalization formatting – so vehicle body type doesn't always have to be in ALL CAPS</li><li>○ Date formatting and calculation – so the Expiration date can appear as "January 1<sup>st</sup>, 2010" instead of "01/01/2010"</li></ul></li><li>• Agency staff member training on the skills needed to create and maintain such documents can be included in the planning.</li><li>• On site or remote setup options are available</li></ul>
<b>Reporting &amp; Data Extraction</b>	<p>If you understand how to use them, the reporting and data extraction capabilities built into your Management System are sufficient to meet the common needs of most agencies. For those agencies with uncommon needs, we are able to create agency specific solutions that allow for the use of any data in the system to be output into any format an agency desires.</p> <ul style="list-style-type: none"><li>• Training on how to get the most out of the built in reporting capabilities of the Agency Management System.</li><li>• Creation of custom reports or data extractions using third party software products (without endangering your Agency Management System)</li><li>• Marketing &amp; Sales use of the Agency Management System</li></ul>
<b>Setup and Customization of the Agency Management System</b>	<p>Your Agency Management System is a powerful and flexible tool. But it must be set up properly in order to realize its full potential. Our work with hundreds of agencies over the span of decades can offer superior perspectives on how you should set up your system.</p> <ul style="list-style-type: none"><li>• Real Time Interface (Transformation Station)</li><li>• Download setup</li><li>• Security Manager</li><li>• Closeday</li><li>• Night Utilities</li><li>• Customization of the Agency Management System<ul style="list-style-type: none"><li>○ Field defaults</li><li>○ Activities</li><li>○ Categories</li><li>○ Custom Decs</li></ul></li><li>• Policy Issuance / MGA specific setup issues</li></ul>



**Service Plans**

Phase	Est. # of Days	Services
1	5	<b>Procedures Development</b>
2	3	<b>Clean up of the Agency Management System</b>
3	2	<b>Staff Training</b> <i># of days varies based on training options selected and number of staff to be trained. Ideally, service staff members would each receive two ½ day training sessions, with no more than 10 staff members in any one training session.</i>
4	4	<b>Proposals</b>
4	2	<b>Reporting &amp; Data Extraction</b>
4	2	<b>Setup and Customization of the Agency Management System</b>
5	1 + 1 day per 10 people for first audit	<b>Quality Assurance Programs</b> 1 day to do set up and strategy planning – normally included as part of initial procedure development
<b>Accounting</b>		
<i>Separate Ongoing Service plans are provided for Accounting</i>		
<b>Outsourced Accounting</b>		

Minimum 20 to 24 Days Total

5 to 6 Months to get started on Basic package of services at 4 days per month.  
Maintenance after that is available at a reduced rate in 1 to 2 day per month increments.