Insight Evolved:
The Art of the Possible

Insight

Insight will become Beazley's complete, end-to-end business workflow tool of record. Internally, it will be a collaborative, role-based system designed around automation and flexibility that establishes a consistent high-level workflow while adapting to product and business line nuances to drive efficiency. Externally, tools will be integrated into the platform to complement the broker experience by taking advantage of the synergies created by a single platform.

This presentation is intended to illustrate strategic, innovative thinking around Beazley's core workflow and is shown primarily from the underwriter perspective (with some allusion to UA, managerial, and broker roles).

Note: The screens that follow illustrate core features and ideas. They are not intended to be complete and/or comprehensive in terms of features, functionality, and user interface.

Rationale

By leveraging Insight to combine elements of a refined workflow for all aspects of Beazley business, significant time and cost savings can be gained, and efficiencies realized across multiple streams of work.

From clearance to policy issuance, every step of the flow of activity can be traced and optimized to deliver ROI against key metrics for the business.

Building on the primary pillars identified as strategic initiatives, the unification of user activity into a single system–combined with advanced automation and machine learning capabilities–positions Beazley to confidently move forward into the next phase of the insurance market and create new ways of working for every member of every team.
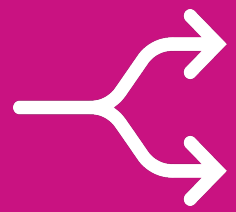
Flexibility

Establish a common workflow and base group of recommended views and settings while allowing for extensive customization that adapts to the unique ways individuals and teams work across Beazley's product and business lines to maximize efficiency.

Self Service

Create a complementary experience that provides real world value to brokers including access to marketing materials, loss runs, claims, upcoming renewals, quick estimates (indication tool), submission status, subjectivities, bind orders and more.

Automation

Harness automation to eliminate duplicative tasks and manual data transformation in order to enable staff to focus on work that requires human brainpower or touch. Future: Integrate machine learning to continue driving an increasingly automated workload.

Data and BI

Unlock unparalleled visibility into the workings of the business through focused data capture and analysis. The core of this new system integration will be deep indexing of all content to extract patterns and anti-patterns to enable better decision-making.
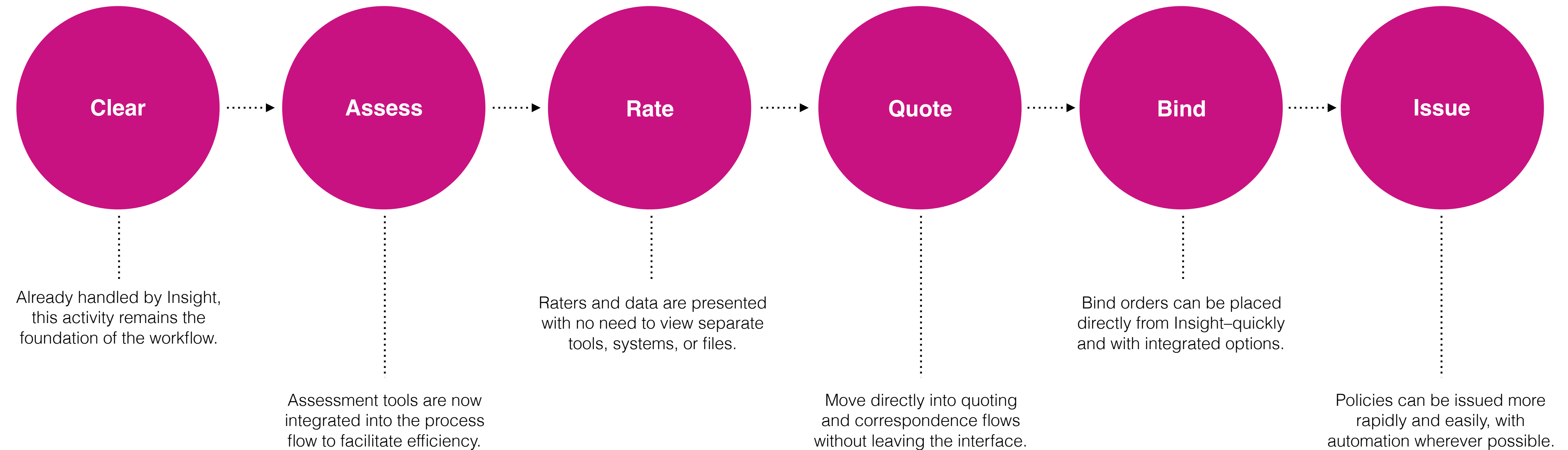
Performance

Focus on quick gains paired with a long-term strategy that addresses the underlying issues significantly impacting overall performance and efficiency. Make pragmatic and targeted decisions about how and when to move data and what the collateral effects might be.

Workflow

By leveraging Insight to combine elements of a refined workflow for all aspects of Beazley business, significant time and cost savings can be gained, and efficiencies realized across multiple streams of work.

Clear ... ▶ **Assess** ... ▶ **Rate** ... ▶ **Quote** ... ▶ **Bind** ... ▶ **Issue**

Already handled by Insight, this activity remains the foundation of the workflow.

Assessment tools are now integrated into the process flow to facilitate efficiency.

Raters and data are presented with no need to view separate tools, systems, or files.

Move directly into quoting and correspondence flows without leaving the interface.

Bind orders can be placed directly from Insight–quickly and with integrated options.

Policies can be issued more rapidly and easily, with automation wherever possible.

INSIGHT™

The single place for all Beazley business.

UNDERWRITER DASHBOARD

Key ideas within Insight for the first screen underwriters see each day

Universal Login
All Insight users, including Beazley employees, external brokers, and eventually the insured, can access everything they need via single sign-on (SSO) and log into the same URL.

INS↑GHT™

marley.sanders@beazley.com

•••••••••••

Sign In

Sign Up
Forgot Password?
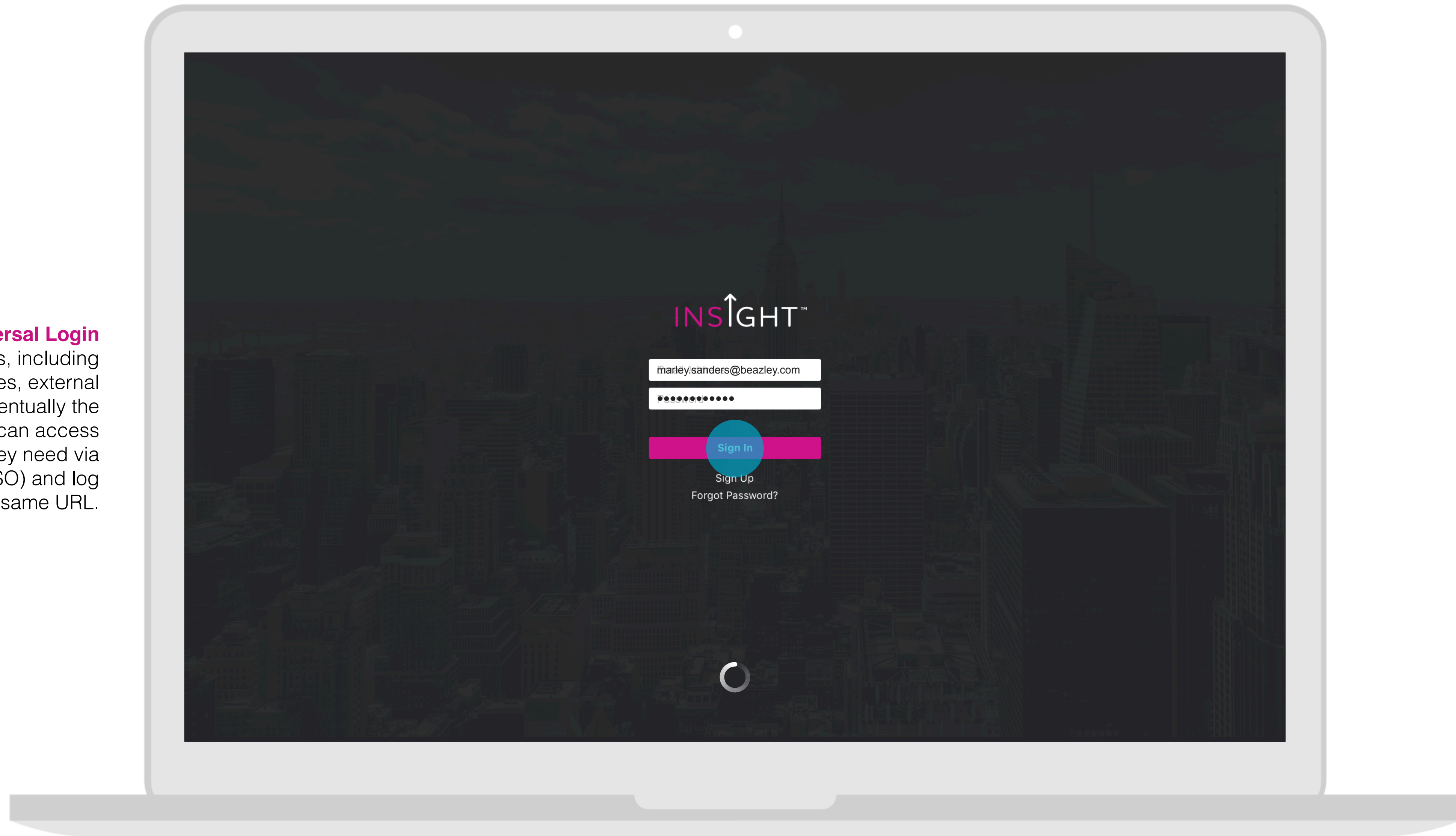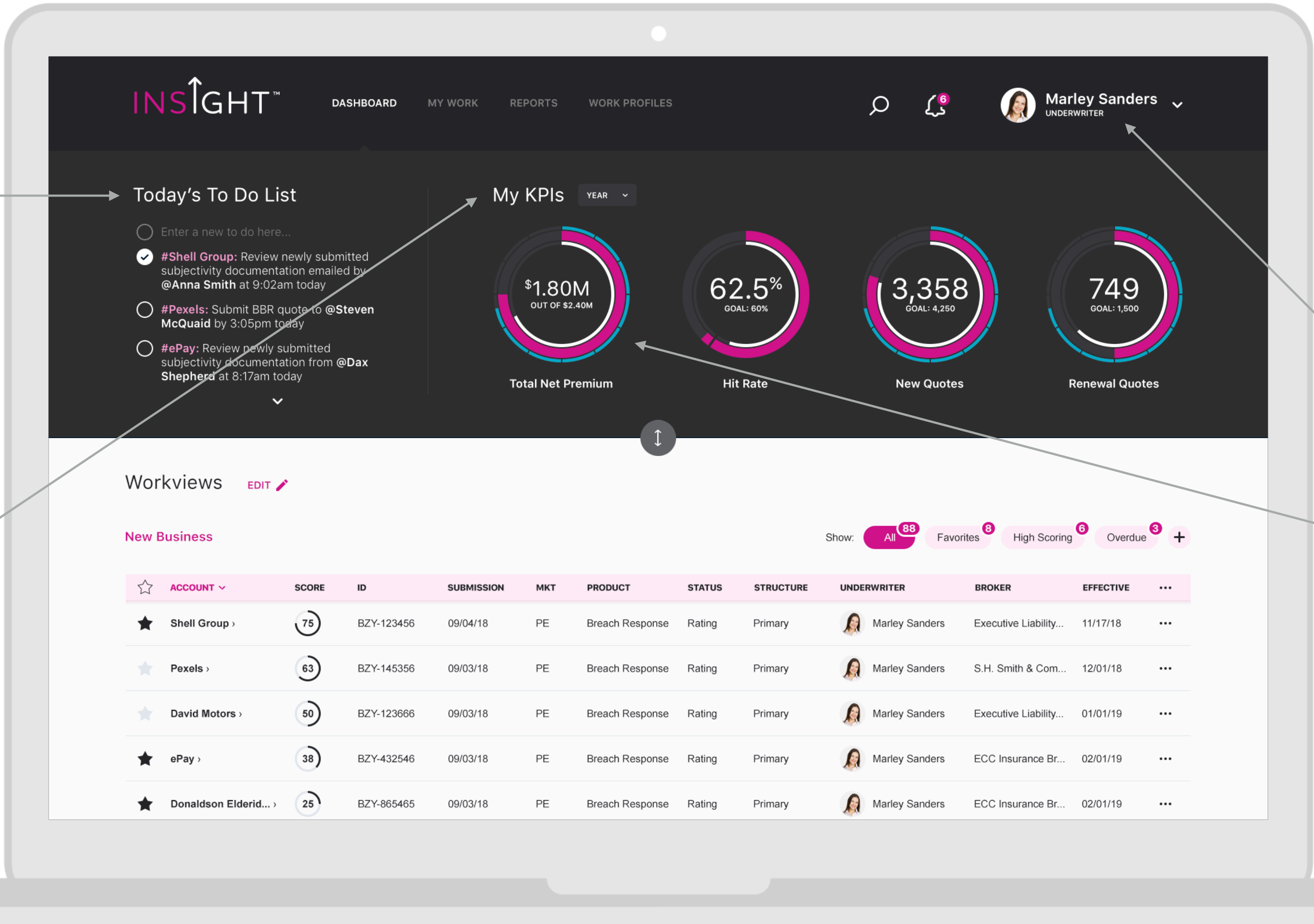
Today's To Do List

Front and center is the day's to do list, automatically generated by the work the user is currently assigned. Users can also manually create additional tasks as needed. Projects are hash-tagged and hyperlinked, and users (coworkers, brokers, and more) are referenced using the @syntax.

Key KPIs

Users can customize key KPIs that appear on their dashboard to help them hit and exceed their business goals. These can be viewed by year, month, week, and day.

Role-Based Views

Underwriters who also manage others can easily toggle between a view of their own KPIs, work, etc. and that of their team.

KPI Details

Clicking on a KPI pops open additional details.

INSIGHT™   DASHBOARD   MY WORK   REPORTS   WORK PROFILES

Marley Sanders
UNDERWRITER

Today's To Do List

Enter a new to do here...

#Shell Group: Review newly submitted subjectivity documentation emailed by @Anna Smith at 9:02am today

#Pexels: Submit BBR quote to @Steven McQuaid by 3:05pm today

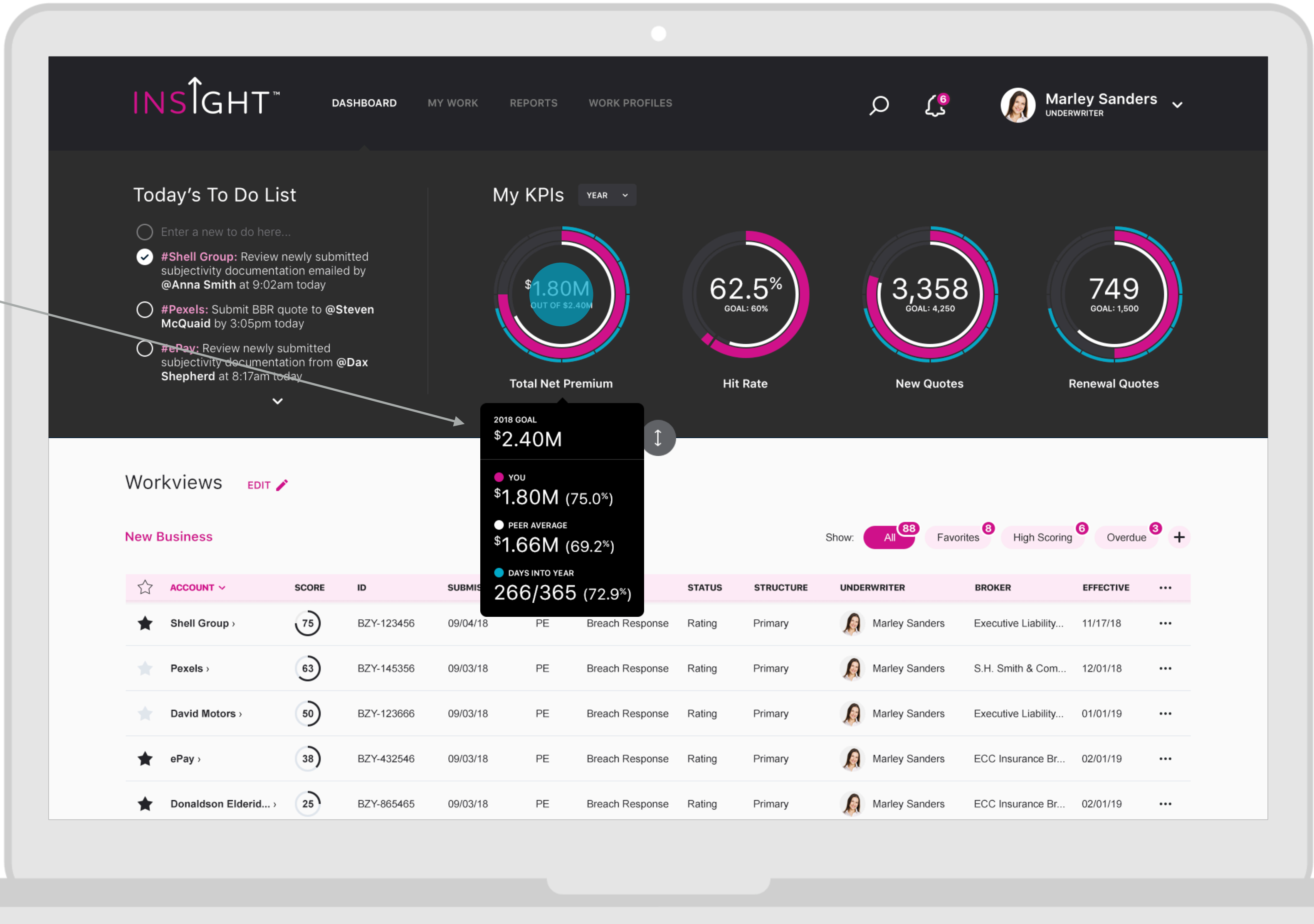#ePay: Review newly submitted subjectivity documentation from @Dax Shepherd at 8:17am today

My KPIs   YEAR

$1.80M
OUT OF $2.40M
Total Net Premium

62.5%
GOAL: 60%
Hit Rate

3,358
GOAL: 4,250
New Quotes

749
GOAL: 1,500
Renewal Quotes

Workviews   EDIT

New Business

Show: All 88   Favorites 8   High Scoring 6   Overdue 3   +

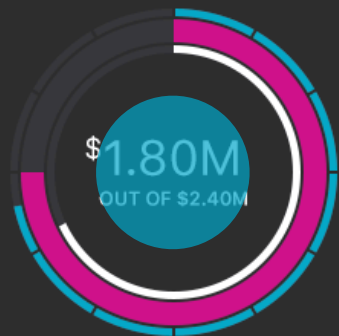|	ACCOUNT	SCORE	ID	SUBMISSION	MKT	PRODUCT	STATUS	STRUCTURE	UNDERWRITER	BROKER	EFFECTIVE	
★	Shell Group ›	75	BZY-123456	09/04/18	PE	Breach Response	Rating	Primary	Marley Sanders	Executive Liability...	11/17/18	...
☆	Pexels ›	63	BZY-145356	09/03/18	PE	Breach Response	Rating	Primary	Marley Sanders	S.H. Smith & Com...	12/01/18	...
☆	David Motors ›	50	BZY-123666	09/03/18	PE	Breach Response	Rating	Primary	Marley Sanders	Executive Liability...	01/01/19	...
★	ePay ›	38	BZY-432546	09/03/18	PE	Breach Response	Rating	Primary	Marley Sanders	ECC Insurance Br...	02/01/19	...
★	Donaldson Elderid... ›	25	BZY-865465	09/03/18	PE	Breach Response	Rating	Primary	Marley Sanders	ECC Insurance Br...	02/01/19	...

Goal Context
Users can see their progress toward their goal as well as their performance compared to their peer average to provide context and foster friendly competition.

Additionally, they can see how far they are into the goal period to determine if they are ahead or behind where they should be.
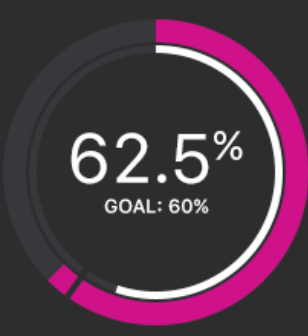
Universal Search
A single universal search is included in the global navigation. Here, users can search across every core object class within the system, including accounts, IDs, employees, brokers (both companies and individuals), endorsements, file content, and more.

Robust Notifications
A notification system alerts users to important automated events that impact their work, team chat messages, system updates, and more.

INS↑GHT™   DASHBOARD   MY WORK   REPORTS   WORK PROFILES

Marley Sanders
UNDERWRITER

Today's To Do List

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My KPIs   YEAR ⌄

$1.80M
OUT OF $2.40M

Total Net Premium

62.5%
GOAL: 60%

Hit Rate

749
GOAL: 1,500

Renewal Quotes

#Shell Group: **@Steve Larkin** created endorsement **E10505112018** based on a manuscript you submitted on 09/01/18.
15 MINUTES AGO

#David Motors: A scheduled contingency reminder email was sent to **@Natalie Stevens** at 3:00pm today.
22 MINUTES AGO

#Pexels: **@Susan Friedman:** "Hey **@Marley Sanders**, I've finished reviewing the contingencies that were sent this morning. We are good to proceed."
46 MINUTES AGO

#ePay: A binder has been automatically created and is ready to be sent to **@Charles Jackson**.
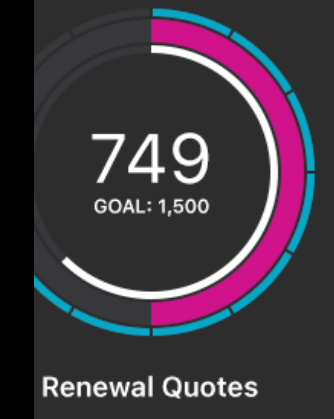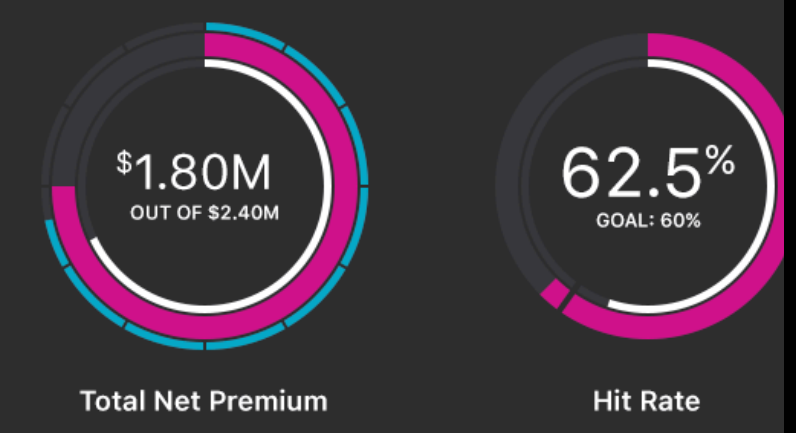**Send Binder**
2 HOURS AGO

#Dunkin' Donuts: A new submission has cleared and has been assigned to you.
3 HOURS AGO

#David Motors: This policy is set to expire in 90 days. A renewal quote has automatically been created and sent to **@Dandra Smith**.
3 HOURS AGO

Workviews   EDIT ✏

New Business

6   Overdue   3   +

	ACCOUNT ⌄	SCORE	ID	SUBMISSION	MKT	PRODUCT	STATUS	STRUCTURE	UNDERWRITER	BROKER	EFFECTIVE	•••
★	Shell Group ›	75	BZY-123456	09/04/18	PE	Breach Response	Rating	Primary	Marley Sanders	Executive Liability...	11/17/18	•••
☆	Pexels ›	63	BZY-145356	09/03/18	PE	Breach Response	Rating	Primary	Marley Sanders	S.H. Smith & Com...	12/01/18	•••
☆	David Motors ›	50	BZY-123666	09/03/18	PE	Breach Response	Rating	Primary	Marley Sanders	Executive Liability...	01/01/19	•••
★	ePay ›	38	BZY-432546	09/03/18	PE	Breach Response	Rating	Primary	Marley Sanders	ECC Insurance Br...	02/01/19	•••
★	Donaldson Elderid... ›	25	BZY-865465	09/03/18	PE	Breach Response	Rating	Primary	Marley Sanders	ECC Insurance Br...	02/01/19	•••

Action-Triggered Notifications
Dependency actions taken by Beazley employees automatically generate notifications sent to impacted individuals.

Automation Notifications
Automated actions performed by the system generate notifications to keep key individuals in the loop.

Chat Notifications
Risk-integrated chat threads generate notifications to tagged individuals when there are new messages to read.

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Send Binder

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#Dunkin' Donuts: A new submission has cleared and has been assigned to you.
3 HOURS AGO

#David Motors: This policy is set to expire in 90 days. A renewal quote has automatically been created and sent to **@Dandra Smith.**
3 HOURS AGO

Interactive Notifications
Certain notification types allow the in-line execution of actions.

New Work Notifications
New work that is cleared to underwriters or UAs automatically generates notifications to alert them.

Renewal Notifications
Upcoming and overdue renewals, including the automated generation of renewal emails, notify key employees to ensure proper awareness.
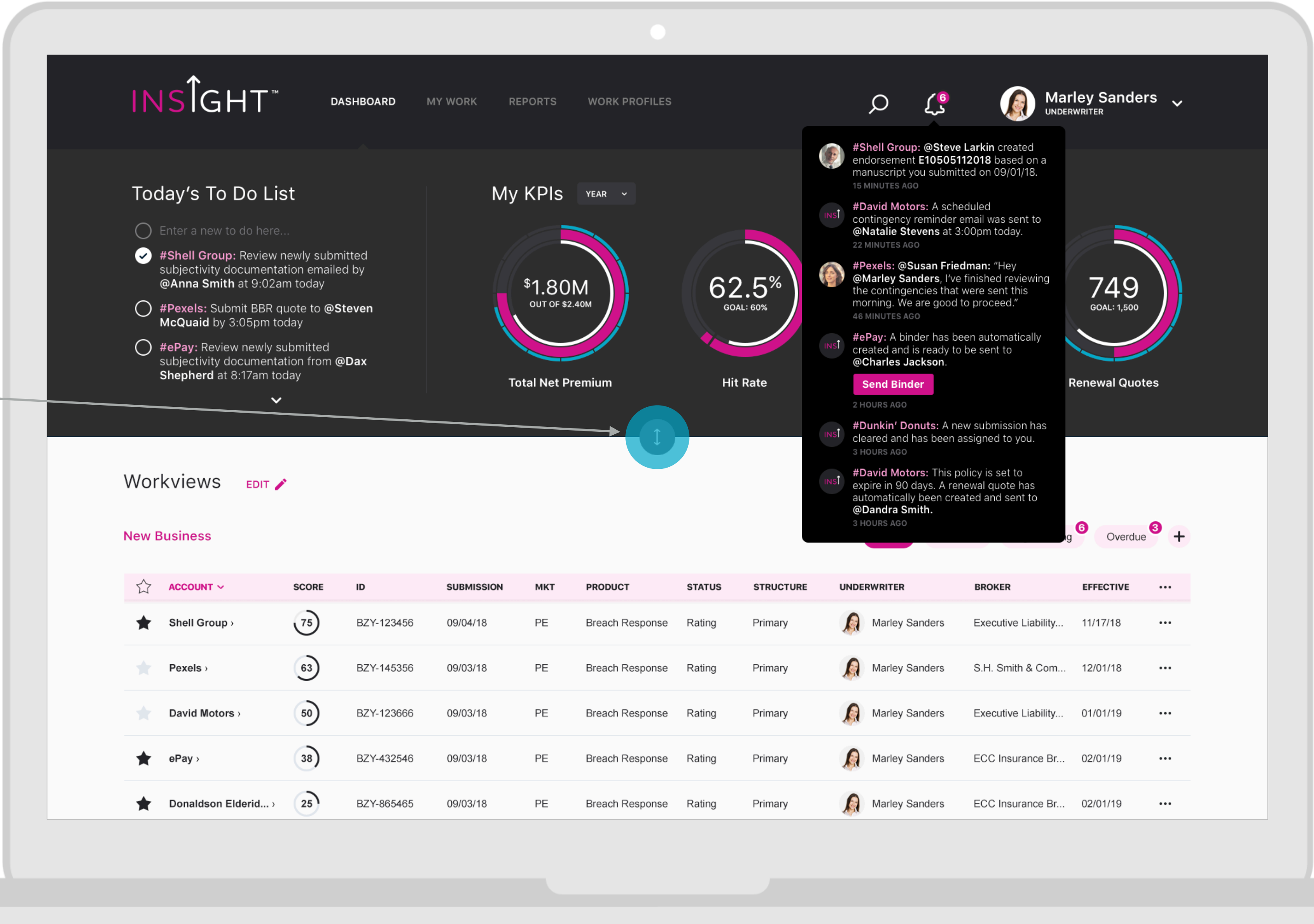
Flexible Workspace
Users can expand their to do list and KPIs to see more or collapse them in order to maximize screen real estate for their workviews.

Collapsed To Dos and KPIs
Users can still manually create to do items and view a more focused KPI for the week when the top module is collapsed.

Customized Workviews
While different personas will be provided with a recommended set of workviews based on their role, business, and product line, customized workviews allow them to work the way they want to work and are at the core of the underwriter dashboard. For example, UAs might have a default workview called "Unassigned Risks" where they go to 'get work,' and can customize it to fit their personal work styles.

Opportunity Score
In the future, each risk is provided a machine learning-based opportunity score that helps the underwater understand the overall priority (based on historical data including broker conversion, bind probability, profitability, and more).

Custom Fields and Filters
The user can customize each workview by choosing which fields are shown (and their order) and create custom filters including minimum and maximum values, and more.

Other Key Features
Risks can be edited in-line (including multiple risks simultaneously) and they can be favorited for easy filtering and access.

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DASHBOARD   MY WORK   REPORTS   WORK PROFILES

Marley Sanders
UNDERWRITER

Enter a new to do here...

Weekly Quote Goal:
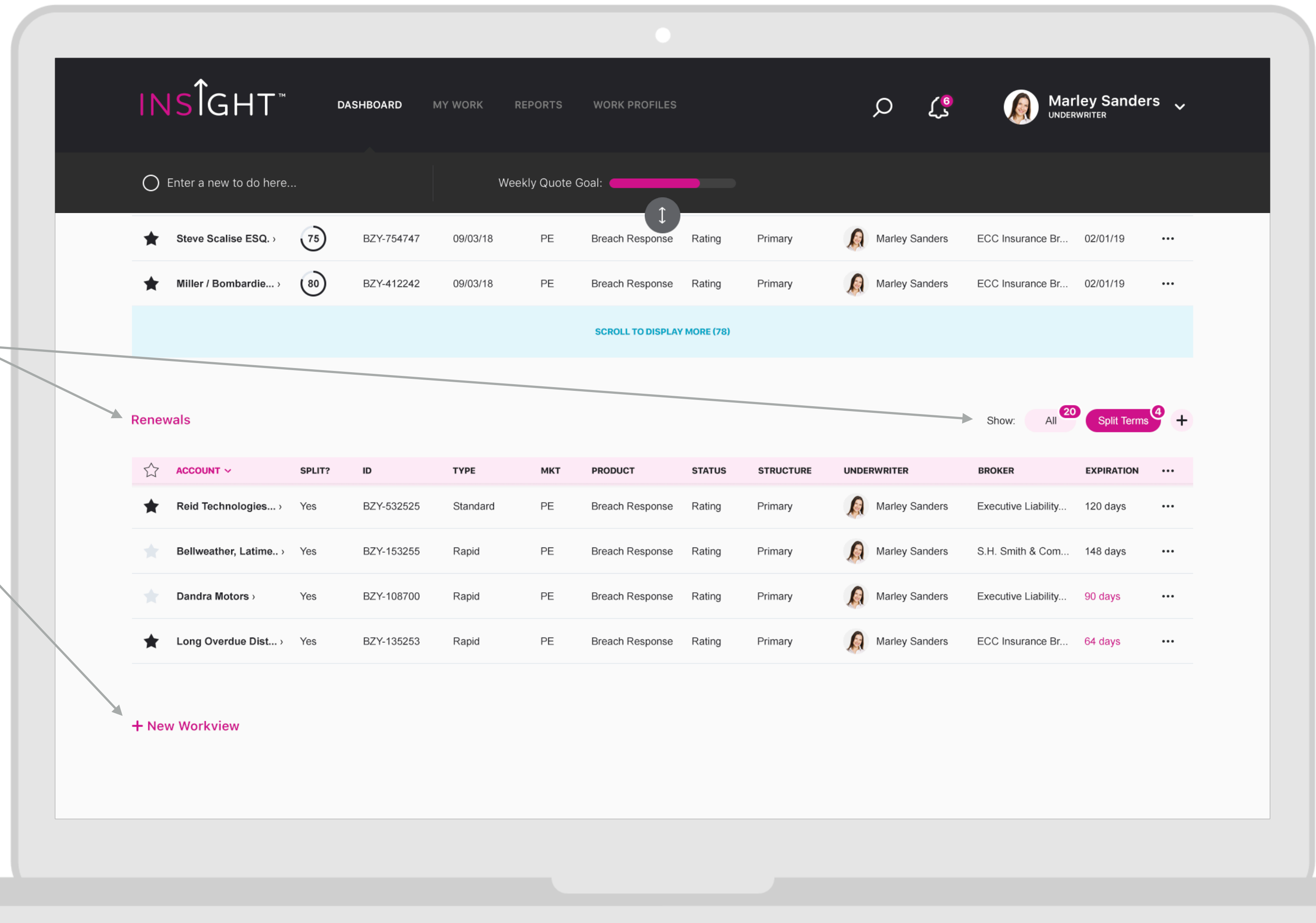
Workviews   EDIT

New Business

Show: All 88   Favorites 8   High Scoring 6   Overdue 3   +

ACCOUNT	SCORE	ID	SUBMISSION	MKT	PRODUCT	STATUS	STRUCTURE	UNDERWRITER	BROKER	EFFECTIVE	
Shell Group ›	75	BZY-123456	09/04/18	PE	Breach Response	Rating	Primary	Marley Sanders	Executive Liability...	11/17/18	...
Pexels ›	63	BZY-145356	09/03/18	PE	Breach Response	Rating	Primary	Marley Sanders	S.H. Smith & Com...	12/01/18	...
David Motors ›	50	BZY-123666	09/03/18	PE	Breach Response	Rating	Primary	Marley Sanders	Executive Liability...	01/01/19	...
ePay ›	38	BZY-432546	09/03/18	PE	Breach Response	Rating	Primary	Marley Sanders	ECC Insurance Br...	02/01/19	...
Donaldson Elderid... ›	25	BZY-865465	09/03/18	PE	Breach Response	Rating	Primary	Marley Sanders	ECC Insurance Br...	02/01/19	...
Pine Bros. LLC. ›	70	BZY-086876	09/04/18	PE	Breach Response	Rating	Primary	Marley Sanders	Executive Liability...	11/17/18	...
Mister Rooter, Inc. ›	75	BZY-553255	09/03/18	PE	Breach Response	Rating	Primary	Marley Sanders	S.H. Smith & Com...	12/01/18	...
Dunkin' Donuts IND ›	51	BZY-235435	09/03/18	PE	Breach Response	Rating	Primary	Marley Sanders	Executive Liability...	01/01/19	...
Steve Scalise ESQ. ›	75	BZY-754747	09/03/18	PE	Breach Response	Rating	Primary	Marley Sanders	ECC Insurance Br...	02/01/19	...
Miller / Bombardie... ›	80	BZY-412242	09/03/18	PE	Breach Response	Rating	Primary	Marley Sanders	ECC Insurance Br...	02/01/19	...

Quick Filters
Clicking on a data-point allows the user to quickly create a filter for all risks that match it.

Multiple Workviews
Here's another example of a custom workview that allows the user to see all of their renewals, filtered to show only those that have split terms.

Users can easily create new workviews by clicking here.

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Marley Sanders
UNDERWRITER

Enter a new to do here...   Weekly Quote Goal:

| | Steve Scalise ESQ. › | 75 | BZY-754747 | 09/03/18 | PE | Breach Response | Rating | Primary | Marley Sanders | ECC Insurance Br... | 02/01/19 | ... |
| | Miller / Bombardie... › | 80 | BZY-412242 | 09/03/18 | PE | Breach Response | Rating | Primary | Marley Sanders | ECC Insurance Br... | 02/01/19 | ... |

SCROLL TO DISPLAY MORE (78)

Renewals   Show: All 20   Split Terms 4   +

	ACCOUNT ⌄	SPLIT?	ID	TYPE	MKT	PRODUCT	STATUS	STRUCTURE	UNDERWRITER	BROKER	EXPIRATION	...
★	Reid Technologies... ›	Yes	BZY-532525	Standard	PE	Breach Response	Rating	Primary	Marley Sanders	Executive Liability...	120 days	...
	Bellweather, Latime... ›	Yes	BZY-153255	Rapid	PE	Breach Response	Rating	Primary	Marley Sanders	S.H. Smith & Com...	148 days	...
	Dandra Motors ›	Yes	BZY-108700	Rapid	PE	Breach Response	Rating	Primary	Marley Sanders	Executive Liability...	90 days	...
★	Long Overdue Dist... ›	Yes	BZY-135253	Rapid	PE	Breach Response	Rating	Primary	Marley Sanders	ECC Insurance Br...	64 days	...

+ New Workview

II

_____

CORE
WORKFLOW

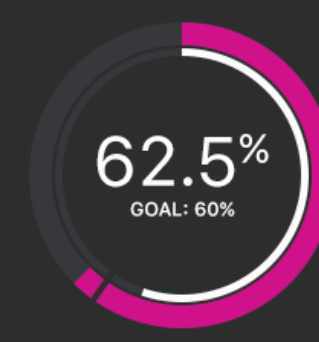The core workflow as presented primarily
through the experience of the underwriter
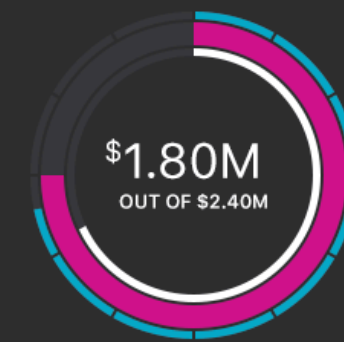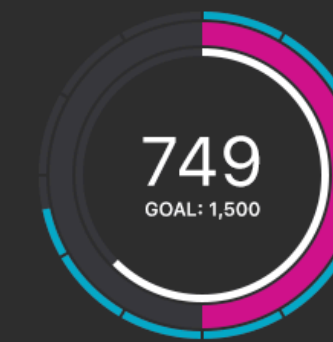
New Risk
An underwriter has been assigned a submission that has cleared.

The underwriter can begin working on the risk by clicking on it.

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Marley Sanders
UNDERWRITER

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Workviews   EDIT ✎

New Business

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	ACCOUNT ∨	SCORE	ID	SUBMISSION	MKT	PRODUCT	STATUS	STRUCTURE	UNDERWRITER	BROKER	EFFECTIVE	⋯
★	Acme Company ›	75	BZY-123456	09/04/18	PE	Breach Response	Cleared	Primary	Marley Sanders	Executive Liability...	11/17/18	⋯
☆	Pexels ›	63	BZY-145356	09/03/18	PE	Breach Response	Rating	Primary	Marley Sanders	S.H. Smith & Com...	12/01/18	⋯
☆	David Motors ›	50	BZY-123666	09/03/18	PE	Breach Response	Rating	Primary	Marley Sanders	Executive Liability...	01/01/19	⋯
★	ePay ›	38	BZY-432546	09/03/18	PE	Breach Response	Rating	Primary	Marley Sanders	ECC Insurance Br...	02/01/19	⋯
★	Donaldson Elderid... ›	25	BZY-865465	09/03/18	PE	Breach Response	Rating	Primary	Marley Sanders	ECC Insurance Br...	02/01/19	⋯

Risk Detail Screen
The core risk workflow is contained within various states of the Risk Detail Screen.

This screen is templatized and customizable based on product type. Key features include in-line editing (enabled by default), real-time saving (no need for a "save" button), and the "happy path" is defaulted (optional elements are collapsed by default).
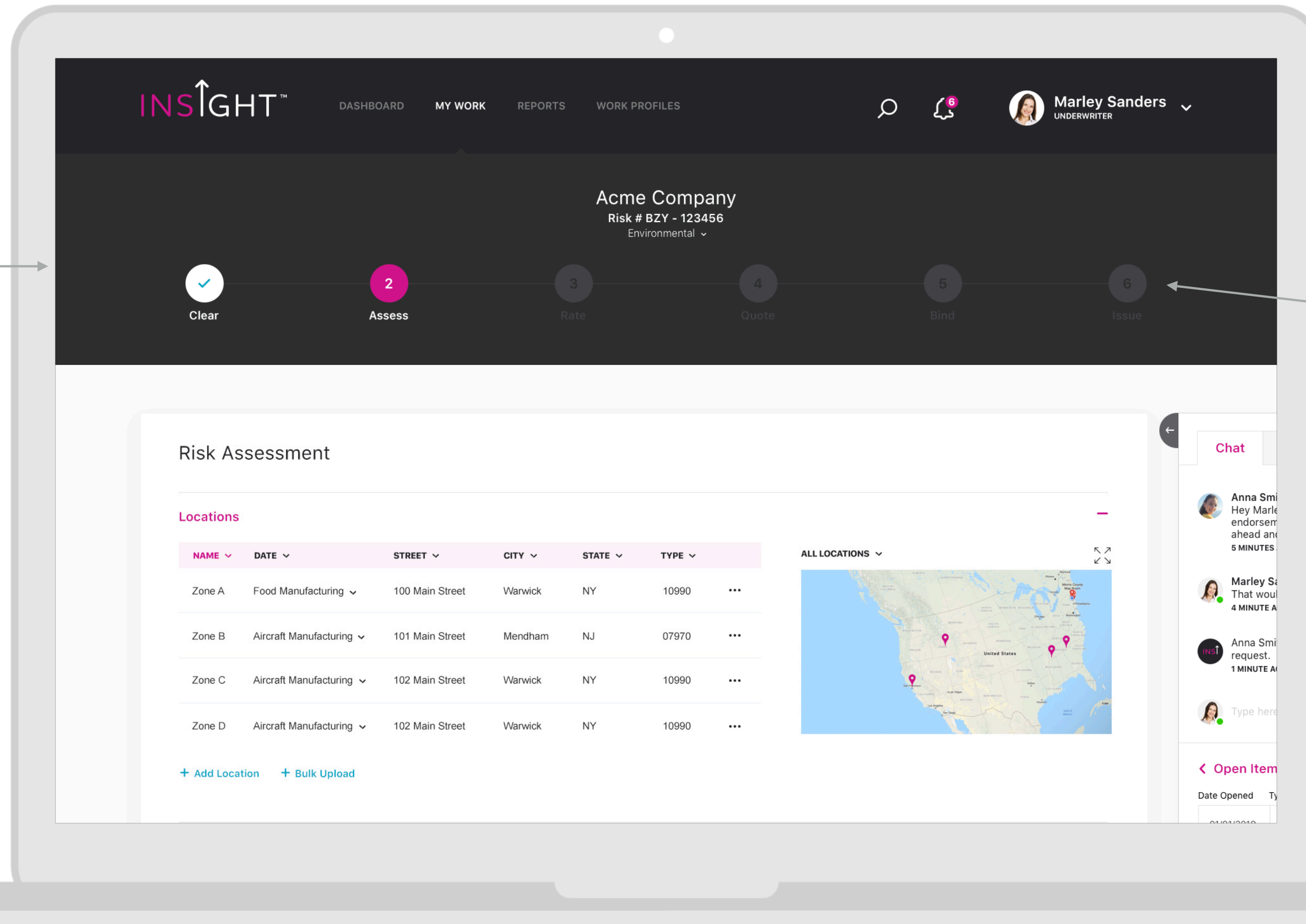
Risk Lifecycle Bar
This bar is both an indicator of how the risk has progressed along its lifecycle and a clickable navigation pattern for the underwriter to move through the various components of the workflow. Since workflow progress is linear and interdependent, certain steps are grayed out until dependencies are met.

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Marley Sanders
UNDERWRITER

Acme Company
Risk # BZY - 123456
Environmental ⌄

✓   2   3   4   5   6
Clear   Assess   Rate   Quote   Bind   Issue

Risk Assessment

Locations   —

NAME ⌄	DATE ⌄	STREET ⌄	CITY ⌄	STATE ⌄	TYPE ⌄	
Zone A	Food Manufacturing ⌄	100 Main Street	Warwick	NY	10990	•••
Zone B	Aircraft Manufacturing ⌄	101 Main Street	Mendham	NJ	07970	•••
Zone C	Aircraft Manufacturing ⌄	102 Main Street	Warwick	NY	10990	•••
Zone D	Aircraft Manufacturing ⌄	102 Main Street	Warwick	NY	10990	•••

ALL LOCATIONS ⌄

+ Add Location   + Bulk Upload

Chat

Anna Smi
Hey Marle
endorsem
ahead an
5 MINUTES

Marley Sa
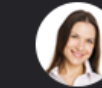That woul
4 MINUTE A

Anna Smi
request.
1 MINUTE A

Type here

‹ Open Item

Date Opened   Ty

Flexible Navigation
The Risk Lifecycle Bar collapses into a smaller state as the user scrolls down the page but remains a sticky navigation element that always adheres to the top of the screen.

Assess View
Here's how the "Assess" view might look like for an environmental risk, showing location information and other detail.

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🔍   🔔 6   **Marley Sanders**
UNDERWRITER

Acme Company ⌄
Risk # BZY - 123456

✓ Clear   ② Assess   ③ Rate   ④ Quote   ⑤ Bind   ⑥ Issue

Risk Assessment

Locations

NAME ⌄	DATE ⌄	STREET ⌄	CITY ⌄	STATE ⌄	TYPE ⌄	
Zone A	Food Manufacturing ⌄	100 Main Street	Warwick	NY	10990	•••
Zone B	Aircraft Manufacturing ⌄	101 Main Street	Mendham	NJ	07970	•••
Zone C	Aircraft Manufacturing ⌄	102 Main Street	Warwick	NY	10990	•••
Zone D	Aircraft Manufacturing ⌄	102 Main Street	Warwick	NY	10990	•••

ALL LOCATIONS ⌄

+ Add Location   + Bulk Upload

General Information

Policy Information

Type
Portfolio

Retroactive Date

Chat

Anna Smi...
Hey Marle...
endorsem...
ahead an...
5 MINUTES

Marley Sa...
That woul...
4 MINUTE A...

Anna Smi...
request.
1 MINUTE A...

Type here...

‹ Open Item...

Date Opened   Ty...
01/01/2019

+ Add Item

‹ Correspon...

URGENT

Marley Sanders
UNDERWRITER

Acme Company ⌄
Risk # BZY - 123456

✓ Clear   ② Assess   ③ Rate   ④ Quote   ⑤ Bind   ⑥ Issue

Zone D   Aircraft Manufacturing ⌄   102 Main Street   Warwick   NY   10990   •••

+ Add Location   + Bulk Upload

General Information —

Policy Information

Type
Portfolio ⌄

Retroactive Date
01/01/2019 📅

Years of Pre-Existing Coverage
0 to 4 ⌄

NODs Retroactive Date
01/01/2019 📅

Transportation Retroactive Date
01/01/2019 📅

Covered Location
TBD ⌄

[Rate]   [Decline]

Chat

Anna Smi...
Hey Marle...
endorsem...
ahead and...
5 MINUTES

Marley Sa...
That woul...
4 MINUTE A...

Anna Smi...
request.
1 MINUTE A...

Type here

‹ Open Item
Date Opened   Ty
01/01/2019

+ Add Item

‹ Correspon...
URGENT

INS↑GHT™

Marley Sanders
UNDERWRITER

6

Acme Company
Risk # BZY - 123456

✓ Clear   2 Assess   3 Rate   4 Quote   5 Bind   6 Issue

Risk Assessment

Locations —

NAME ∨	DATE ∨	STREET ∨	CITY ∨	STATE ∨	TYPE ∨	
Zone A	Food Manufacturing ∨	100 Main Street	Warwick	NY	10990	⋯
Zone B	Aircraft Manufacturing ∨	101 Main Street	Mendham	NJ	07970	⋯
Zone C	Aircraft Manufacturing ∨	102 Main Street	Warwick	NY	10990	⋯
Zone D	Aircraft Manufacturing ∨	102 Main Street	Warwick	NY	10990	⋯

+ Add Location   + Bulk Upload

General Information —

Policy Information

Type
Portfolio

Retroactive Date

Chat   Event Log

Anna Smith
Hey Marley, we'll need a manuscript endorsement for this risk. Should I go ahead and request it?
5 MINUTES AGO

Marley Sanders
That would be great. Thanks Anna!
4 MINUTE AGO

Anna Smith submitted a manuscript request.
1 MINUTE AGO

Type here to chat...

‹ Open Items

Date Opened	Type	
01/01/2019	Contingency	⋯

+ Add Item

‹ Correspondence

URGENT_Acme_Co_Submission.eml   ⋯

Sidebar
The sidebar provides quick access to key details and collaboration threads for the risk. It can be easily expanded or collapsed to maximize available screen real estate for the task at hand.

INSIGHT™

DASHBOARD   MY WORK   REPORTS   WORK PROFILES

6

Marley Sanders
UNDERWRITER

Acme Company
Risk # BZY - 123456

✓ Clear

2 Assess

3 Rate

4 Quote

5 Bind

6 Issue

Risk Assessment

Locations   —

NAME ⌄	DATE ⌄	STREET ⌄	CITY ⌄	STATE ⌄	TYPE ⌄	
Zone A	Food Manufacturing ⌄	100 Main Street	Warwick	NY	10990	•••
Zone B	Aircraft Manufacturing ⌄	101 Main Street	Mendham	NJ	07970	•••
Zone C	Aircraft Manufacturing ⌄	102 Main Street	Warwick	NY	10990	•••
Zone D	Aircraft Manufacturing ⌄	102 Main Street	Warwick	NY	10990	•••

+ Add Location   + Bulk Upload

General Information   —

Policy Information

Type
Portfolio ⌄

Retroactive Date

Chat   Event Log

Anna Smith
Hey Marley, we'll need a manuscript endorsement for this risk. Should I go ahead and request it?
5 MINUTES AGO

Marley Sanders
That would be great. Thanks Anna!
4 MINUTE AGO

Anna Smith submitted a manuscript request.
1 MINUTE AGO

Type here to chat...

‹ **Open Items**

Date Opened	Type	
01/01/2019	Contingency	•••

+ Add Item

‹ **Correspondence**

📧 URGENT_Acme_Co_Submission.eml   •••

Chat
Using the sidebar, users can easily collaborate within the context of a risk. Conversations are automatically threaded by risk and connected to the notification system.

INS↑GHT™

DASHBOARD   MY WORK   REPORTS   WORK PROFILES

Marley Sanders
UNDERWRITER

Acme Company
Risk # BZY - 123456

✓ Clear

2 Assess

3 Rate

4 Quote

5 Bind

6 Issue

Risk Assessment

Locations

NAME	DATE	STREET	CITY	STATE	TYPE
Zone A	Food Manufacturing	100 Main Street	Warwick	NY	10990	
Zone B	Aircraft Manufacturing	101 Main Street	Mendham	NJ	07970	
Zone C	Aircraft Manufacturing	102 Main Street	Warwick	NY	10990	
Zone D	Aircraft Manufacturing	102 Main Street	Warwick	NY	10990	

+ Add Location   + Bulk Upload

General Information

Policy Information

Type
Portfolio

Retroactive Date

+ Add Item

‹ Correspondence

📧 URGENT_Acme_Co_Submission.eml   •••
📄 URGENT_Acme_Co_Submission.pdf   •••
📄 URGENT_Acme_Co_Submission2.pdf   •••

+ Add Correspondence

‹ Scheduled Emails

Frequency   Email Template
● Weekly   Contingency Follow Up   •••
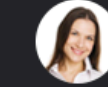
+ Send Email

My Links

Claim Center
SSL Forms

+ Add Link

Correspondence
All documentation can be searched, sorted, filtered, and previewed within Insight.

Centralized Files

All documentation–broker email, attachments, system-generated files and emails, employee-generated emails, and risk notes–is combined into one centralized location for easy access.

Automated Emails
Users can create and schedule automated emails from within the Correspondence view of the Risk Detail Screen.

Drag and Drop Upload
Users can drag files from their computers directly into Insight to add them to the correspondence library.

Auto Attachment Detection
As users upload emails the system automatically extracts all attachments.

Content Tagging
Users tag content by category and enter in descriptions as they upload files.

INS\^IGHT™

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Marley Sanders
UNDERWRITER

Acme Company
Risk # BZY - 123456

Clear   2 Assess   3 Rate   4 Quote   5 Bind   6 Issue

Correspondence

Create Email   Upload Files

DATE	CATEGORY	DESCRIPTION	NAME	TYPE
01/01/18	Submission	Email appended from Insight	URGENT_Acme_Co_Submission.eml	
01/01/18	Binder	First Round Binder	URGENT_Acme_Co_Submission.pdf	
01/01/18	Submission	Email appended from Insight	URGENT_Acme_Co_Submission.eml	
01/01/18	Binder	First Round Binder	URGENT_Acme_Co_Submission.pdf	
01/01/18	Submission	Email appended from Insight	URGENT_Acme_Co_Submission.eml	
01/01/18	Binder	First Round Binder	URGENT_Acme_Co_Submission.pdf	
01/01/18	Submission	Email appended from Insight	URGENT_Acme_Co_Submission.eml	
01/01/18	Binder	First Round Binder	URGENT_Acme_Co_Submission.pdf	
01/01/18	Submission	Email appended from Insight	URGENT_Acme_Co_Submission.eml	

+ Add Item

‹ Correspondence

URGENT_Acme_Co_Submission.eml   ...
URGENT_Acme_Co_Submission.pdf   ...
URGENT_Acme_Co_Submission2.pdf   ...

+ Add Correspondence

‹ Scheduled Emails

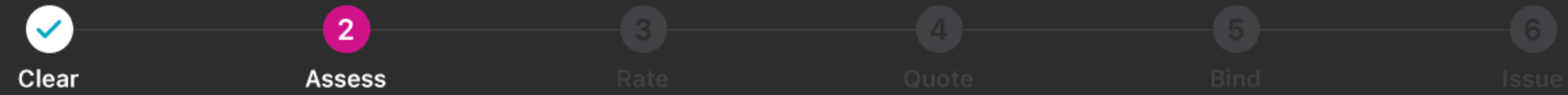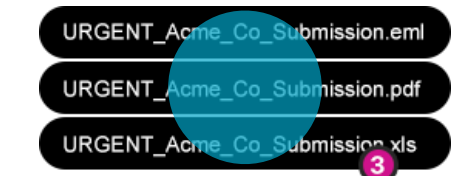Frequency   Email Template

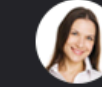● Weekly ⌄   Contingency Follow Up   ...

+ Send Email

My Links

Claim Center
SSL Forms

+ Add Link

Send Email
The user clicks on the Send Email button…

INS↑GHT™   DASHBOARD   MY WORK   REPORTS   WORK PROFILES

Marley Sanders
UNDERWRITER

Acme Company ⌄
Risk # BZY - 123456

✓ Clear   2 Assess   3 Rate   4 Quote   5 Bind   6 Issue

+ Add Item

Create Email

‹ Correspondence

📄 URGENT_Acme_Co_Submission.eml   ⋯

📄 URGENT_Acme_Co_Submission.pdf   ⋯

📄 URGENT_Acme_Co_Submission2.pdf   ⋯

+ Add Correspondence

Email Template: Decline Risk   ⌄

To: Jane.Smith@brokersrus.com

From: Matt.Vaz@Beazley.com

Cc: Mike.Miller@Beazley.com

Bcc:

Subject: SUBMISSION DECLINED: Acme Company BBR

B I U S ❞ </> H₁ H₂ ≔ ≡ x₂ x² ⇥ ⇤ ¶ Normal ⇕ A 🅰

Message: Dear [INSERT NAME],

Thank you for sending the above mentioned risk for our review. We regret to inform you that we will be unable
to provide a quote for this applicant due to the following reason(s): [INSERT RATIONALE],

Again, we would like to thank you for sending this risk for our review and look forward to partnering with you in
the near future.

Sincerely,
Matt Vaz
Underwriter
BEAZLEY GROUP

Our Reference: BZY-123456

a: 30 Batterson Park Rd. Farmington, CT 06032

‹ Scheduled Emails

Frequency   Email Template

● Weekly ⌄   Contingency Follow Up ⌄   ⋯

+ Send Email

My Links

Claim Center
SSL Forms

+ Add Link

Create Email
Users generate emails from existing templates that include highlighted variables for them to customize to maximize efficiency.

INSIGHT™

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6

Marley Sanders
UNDERWRITER

Acme Company ⌄
Risk # BZY - 123456

✓ Clear   ② Assess   ③ Rate   ④ Quote   ⑤ Bind   ⑥ Issue

Again, we would like to thank you for sending this risk for our review and look forward to partnering with you in the near future.

Sincerely,
Matt Vaz
Underwriter
BEAZLEY GROUP

Our Reference: BZY-123456

a: 30 Batterson Park Rd. Farmington, CT 06032
e: matt.vaz@endava.com
w: www.beazley.com

Attachments:	ALL	DATE ⌄	CATEGORY ⌄	DESCRIPTION ⌄	NAME ⌄	TYPE ⌄
	☐	10/01/18	Submission	Appended from Insight	URGENT_Acme_Co_Submission.eml	
	☐	10/01/18	Binder	First Round Binder	URGENT_Acme_Co_Submission.pdf	

+ Add Attachment

Follow Up: 10/01/18   📅

Send   Cancel

+ Add Item

‹ **Correspondence**

📄 URGENT_Acme_Co_Submission.eml   ...
📄 URGENT_Acme_Co_Submission.pdf   ...
📄 URGENT_Acme_Co_Submission2.pdf   ...
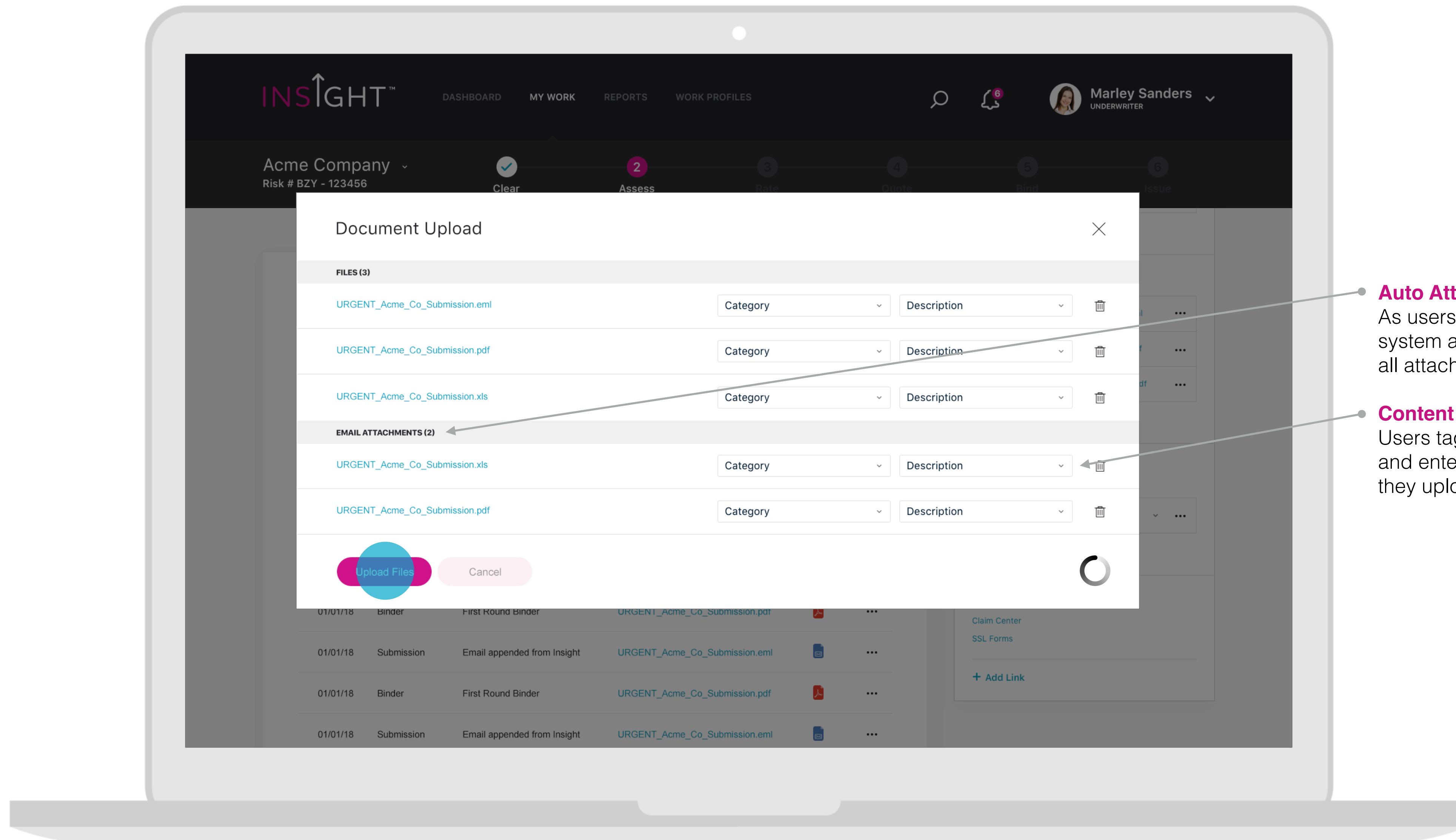
+ Add Correspondence

‹ **Scheduled Emails**

Frequency   Email Template
● Weekly ⌄   Contingency Follow Up ⌄   ...

+ Send Email

My Links

Claim Center
SSL Forms

+ Add Link

Efficient Attachments
Users can easily add files from the document library to emails generated within Insight.

Automated Follow Ups
Users can schedule a follow up, which automatically creates a to do item.

INSIGHT™ DASHBOARD   MY WORK   REPORTS   WORK PROFILES

Marley Sanders
UNDERWRITER

Acme Company
Risk # BZY - 123456

1 Clear   2 Assess   3 Rate   4 Quote   5 Bind   6 Issue

Zone D   Aircraft Manufacturing   102 Main Street   Warwick   NY   10990   ...

+ Add Location   + Bulk Upload

General Information   —

Policy Information

Type
Portfolio

Retroactive Date
01/01/2019

Years of Pre-Existing Coverage
0 to 4

NODs Retroactive Date
01/01/2019

Transportation Retroactive Date
01/01/2019

Covered Location
TBD

Rate   Decline

+ Add Item

< **Correspondence**

URGENT_Acme_Co_Submission.eml   ...

URGENT_Acme_Co_Submission.pdf   ...

URGENT_Acme_Co_Submission2.pdf   ...

+ Add Correspondence

< **Scheduled Emails**

Frequency   Email Template
● Weekly   Contingency Follow Up   ...

+ Send Email

My Links

Claim Center
SSL Forms

+ Add Link

Assessment Complete
Once the assessment is complete, the user clicks the "Rate" button to move into rating.

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DASHBOARD   MY WORK   REPORTS   WORK PROFILES

🔍   🔔 6   Marley Sanders
UNDERWRITER

Acme Company ⌄
Risk # BZY - 123456

✓ Clear   ✓ Assess   3 Rate   4 Quote   5 Bind   6 Issue

Risk Details

Scoring   —

Scoring Summary

LOCATION TYPE ⌄	NUMBER ⌄	STATE ⌄	GEOLOGY ⌄	WEATHER ⌄	AGE ⌄	PROXIMITY ⌄
Food Manufacturing	02	NY	7	5	3	5
Aircraft Manufacturing	02	NJ	3	3	7	4

Scoring Details

+ **Food Manufacturing**

— **Aircraft Manufacturing**

   — Site Geology, Weather & Coastal, Catastrophic Release, EHS

Risk	Quick Score		Score	Comments
Location Geology / Hydrology http://www.usgs.gov	Low	Medium	High	7 ⌄	Long industrial history.

Correspondence

📧 URGENT_Acme_Co_Submission.eml   •••
📄 URGENT_Acme_Co_Submission.pdf   •••
📄 URGENT_Acme_Co_Submission2.pdf   •••

+ Add Correspondence

Scheduled Emails

Frequency   Email Template
● Weekly ⌄   Contingency Follow Up   •••

+ Send Email

My Links

Claim Center
SSL Forms

+ Add Link

+ Add Item

Rating Section
This is where the risk will be rated. The experience will be unique for every line of business.

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Acme Company ⌄
Risk # BZY - 123456

①✓ Clear   ②✓ Assess   ③ Rate   ④ Quote   ⑤ Bind   ⑥ Issue

| Aircraft Manufacturing | 02 | NJ | ③ | ③ | ⑦ | ④ |

Scoring Details

+ Food Manufacturing

− Aircraft Manufacturing

  − Site Geology, Weather & Coastal, Catastrophic Release, EHS

Risk	Quick Score			Score	Comments
Location Geology / Hydrology http://www.usgs.gov	Low	Medium	High	7 ⌄	Long industrial history.
Weather Exposure http://www.usgs.gov	Low	Medium	High	5 ⌄	
Age of Facility	Low	Medium	High	8 ⌄	
Receptor Proximity	Low	Medium	High	2 ⌄	

+ Third-Party, Compliance, Change in Use, Planned Construction, Pending Transaction

Exposure   +

+ Add Item

‹ **Correspondence**

📄 URGENT_Acme_Co_Submission.eml   ...
📄 URGENT_Acme_Co_Submission.pdf   ...
📄 URGENT_Acme_Co_Submission2.pdf   ...

+ Add Correspondence

‹ **Scheduled Emails**

Frequency   Email Template
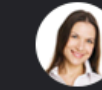● Weekly ⌄   Contingency Follow Up ⌄   ...

+ Send Email

My Links

Claim Center
SSL Forms

+ Add Link

Redesigned Scoring
Users can easily score risks on one page with a minimal number of clicks.

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Marley Sanders
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Acme Company
Risk # BZY - 123456

✓ Clear   ✓ Assess   **3** Rate   4 Quote   5 Bind   6 Issue

Exposure   +

Endorsements   −

☑ Mandatory

☑ Standard

+ Edit Endorsements

Contingencies   −

There are no contingencies associated with this risk.

+ Add Contingency

Quote   Decline

+ Add Item

< Correspondence

📄 URGENT_Acme_Co_Submission.eml   …

📄 URGENT_Acme_Co_Submission.pdf   …

📄 URGENT_Acme_Co_Submission2.pdf   …

+ Add Correspondence

< Scheduled Emails

Frequency   Email Template

● Weekly ⌄   Contingency Follow Up   …

+ Send Email

My Links

Claim Center

SSL Forms

+ Add Link

Default Endorsements
Mandatory and standard endorsements are selected by default.

Users can easily edit manuscripts and endorsements.

Endorsements

Insight houses all Beazley endorsements for easy inclusion.

Insight Interface

INS\IGHT™

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Marley Sanders
UNDERWRITER

Acme Company ⌄
Risk # BZY - 123456

Clear — Assess — **3** Rate — 4 Quote — 5 Bind — 6 Issue

Endorsements

Add Endorsement · Add Manuscript

ALL	REFERENCE #	NAME	DESCRIPTION	TYPE	STATUS
☑	E10505 112017 ed.	Asbestos, Pollution, and Contamination	Adds an exclusion for asbestos, pollution, and contamination under policy	Mandatory	Active
☑	E10505 112017 ed.	Asbestos, Pollution, and Contamination	Adds an exclusion for asbestos, pollution, and contamination under policy	Mandatory	Active
☑	E10505 112017 ed.	Asbestos, Pollution, and Contamination	Adds an exclusion for asbestos, pollution, and contamination under policy	Mandatory	Active

CLASS OF LAW — New York ⌄

	E10505 112017 ed.	Asbestos, Pollution, and Contamination	Adds an exclusion for asbestos, pollution, and contamination under policy	Standard	Active
☑	E10505 112017 ed.	Asbestos, Pollution, and Contamination	Adds an exclusion for asbestos, pollution, and contamination under policy	Standard	Active
☑	E10505 112017 ed.	Asbestos, Pollution, and Contamination	Adds an exclusion for asbestos, pollution, and contamination under policy	Mandatory	Active

LIMIT — $100,000

☑	E10505 112017 ed.	Asbestos, Pollution, and Contamination	Adds an exclusion for asbestos, pollution, and contamination under policy	Standard	Active

+ Add Item

< **Correspondence**

- URGENT_Acme_Co_Submission.eml ···
- URGENT_Acme_Co_Submission.pdf ···
- URGENT_Acme_Co_Submission2.pdf ···

+ Add Correspondence

< **Scheduled Emails**

Frequency · Email Template

● Weekly ⌄ · Contingency Follow Up ⌄ · ···

+ Send Email

My Links

Claim Center
SSL Forms

+ Add Link

Marley Sanders
UNDERWRITER

Acme Company ⌄
Risk # BZY - 123456

✓ Clear   ✓ Assess   ③ Rate   ④ Quote   ⑤ Bind   ⑥ Issue

+ Add Item

Add Endorsement ✕

SORT BY DATE ⌄

✓ E00303 022008 ed.
Add/Delete Endorsement Without Additional Premium
SURPLUS LINES ONLY

☐ E00303 022008 ed.
Add/Delete Endorsement Without Additional Premium
SURPLUS LINES ONLY

☐ E00303 022008 ed.
Add/Delete Endorsement Without Additional Premium
SURPLUS LINES ONLY

☐ E00303 022008 ed.
Add/Delete Endorsement Without Additional Premium
SURPLUS LINES ONLY

☐ E00303 022008 ed.

Effective date of this Endorsement: **<Effective Date>**
This Endorsement is attached to and forms a part of Policy Number: <Policy Number>
<Insurer> referred to in this endorsement as either the "Insurer" or the "Underwriters"

ELECT OPTIONAL EXTENSION PERIOD

This endorsement modifies insurance provided under the following:

Beazley ENVIRO Insurance

In consideration of the premium charged for the Policy, it is hereby understood and agreed that the **Insured** has elected to purchase the **Optional Extension Period** pursuant to Clause **XIII.** of the Policy.

All other terms and conditions of this Policy remain unchanged.

_____
Authorized Representative

SURPLUS LINES ONLY

☐ E00303 022008 ed.	
Add/Delete Endorsement Without Additional Premium	
SURPLUS LINES ONLY	

☐ E00303 022008 ed.	
Add/Delete Endorsement Without Additional Premium	
SURPLUS LINES ONLY	

☐ E00303 022008 ed.	
Add/Delete Endorsement Without Additional Premium	
SURPLUS LINES ONLY	

☐ E00303 022008 ed.	
Add/Delete Endorsement Without Additional Premium	
SURPLUS LINES ONLY	

☐ E00303 022008 ed.	
Add/Delete Endorsement Without Additional Premium	
SURPLUS LINES ONLY	

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All other terms and conditions of this Policy remain unchanged.

_____
Authorized Representative

Acme

Risk # BZY

En

LIMIT $100,000

☑ E10505 112017 ed.   Asbestos, Pollution, and Contamination   Adds an exclusion for asbestos, pollution, and contamination under policy ⓘ   Standard   Active

Add Endorsements   **Cancel**

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6

Marley Sanders
UNDERWRITER

Acme Company
Risk # BZY - 123456

✓   ✓   **3**   4   5   6
Clear   Assess   Rate   Quote   Bind   Issue

Endorsements

Add Endorsement   Add Manuscript

☑ ALL	REFERENCE #	NAME	DESCRIPTION	TYPE	STATUS
☑	E10505 112017 ed.	Asbestos, Pollution, and Contamination	Adds an exclusion for asbestos, pollution, and contamination under policy ⊙	Mandatory	Active
☑	E10505 112017 ed.	Asbestos, Pollution, and Contamination	Adds an exclusion for asbestos, pollution, and contamination under policy ⊙	Mandatory	Active
☑	E10505 112017 ed.	Asbestos, Pollution, and Contamination	Adds an exclusion for asbestos, pollution, and contamination under policy ⊙	Mandatory	Active
CLASS OF LAW		New York ⌄			
☑	E10505 112017 ed.	Asbestos, Pollution, and Contamination	Adds an exclusion for asbestos, pollution, and contamination under policy ⊙	Standard	Active
☑	E10505 112017 ed.	Asbestos, Pollution, and Contamination	Adds an exclusion for asbestos, pollution, and contamination under policy ⊙	Standard	Active
☑	E10505 112017 ed.	Asbestos, Pollution, and Contamination	Adds an exclusion for asbestos, pollution, and contamination under policy ⊙	Mandatory	Active
LIMIT		$100,000			
☑	E10505 112017 ed.	Asbestos, Pollution, and Contamination	Adds an exclusion for asbestos, pollution, and contamination under policy ⊙	Standard	Active

+ Add Item

‹ **Correspondence**

📄 URGENT_Acme_Co_Submission.eml   •••
📄 URGENT_Acme_Co_Submission.pdf   •••
📄 URGENT_Acme_Co_Submission2.pdf   •••

+ Add Correspondence

‹ **Scheduled Emails**

Frequency   Email Template
● Weekly ⌄   Contingency Follow Up ⌄   •••

+ Send Email

My Links

Claim Center
SSL Forms

+ Add Link

Adding Manuscripts
Users can initiate a new manuscript workflow from within Insight.

Manuscript Workflow
Once the details are submitted, a notification is automatically sent to the wording team and a task is created for them.

Acme Company ⌄
Risk # BZY - 123456

✓ Clear   ✓ Assess   **3** Rate   ④ Quote   ⑤ Bind   ⑥ Issue

Endorsements

[Add Endorsement]   [Add Manuscript]

☑ ALL	REFERENCE # ⌄	NAME ⌄	DESCRIPTION ⌄	TYPE ⌄	STATUS ⌄
☑	E10505 112017 ed.	Asbestos, Pollution, and Contamination	Adds an exclusion for asbestos, pollution, and contamination under policy	Mandatory	Active
☑	E10505 112017 ed.	Asbestos, Pollution, and Contamination	Adds an exclusion for asbestos, pollution, and contamination under policy	Mandatory	Active
☑	E10505 112017 ed.	Asbestos, Pollution, and Contamination	Adds an exclusion for asbestos, pollution, and contamination under policy	Mandatory	Active
CLASS OF LAW		New York ⌄			
☑	E10505 112017 ed.	Asbestos, Pollution, and Contamination	Adds an exclusion for asbestos, pollution, and contamination under policy	Standard	Active
☑	E10505 112017 ed.	Asbestos, Pollution, and Contamination	Adds an exclusion for asbestos, pollution, and contamination under policy	Standard	Active
☑	E10505 112017 ed.	Asbestos, Pollution, and Contamination	Adds an exclusion for asbestos, pollution, and contamination under policy	Mandatory	Active
LIMIT		$100,000			
☑	E10505 112017 ed.	Asbestos, Pollution, and Contamination	Adds an exclusion for asbestos, pollution, and contamination under policy	Standard	Active

+ Add Item

❮ Correspondence

📧	URGENT_Acme_Co_Submission.eml	...
📄	URGENT_Acme_Co_Submission.pdf	...
📄	URGENT_Acme_Co_Submission2.pdf	...

+ Add Correspondence

❮ Scheduled Emails

Frequency   Email Template

● Weekly ⌄   Contingency Follow Up ⌄   ...

+ Send Email

My Links

Claim Center
SSL Forms

+ Add Link

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DASHBOARD   MY WORK   REPORTS   WORK PROFILES

🔍   🔔 6   Marley Sanders
UNDERWRITER

Acme Company ⌄
Risk # BZY - 123456

✓ Clear   ✓ Assess   3 Rate   4 Quote   5 Bind   6 Issue

Exposure   +

Endorsements   —

20   10   5   1
Mandatory   Standard   Optional   Manuscript

+ Edit Endorsements

Contingencies   —

There are no contingencies associated with this risk.

+ Add Contingency

Quote   Decline

+ Add Item

< **Correspondence**

📧 URGENT_Acme_Co_Submission.eml   •••
📄 URGENT_Acme_Co_Submission.pdf   •••
📄 URGENT_Acme_Co_Submission2.pdf   •••

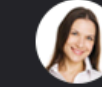+ Add Correspondence

< **Scheduled Emails**

Frequency   Email Template
● Weekly ⌄   Contingency Follow Up   •••

+ Send Email

My Links

Claim Center
SSL Forms

+ Add Link

Contingencies
Users can also add contingencies from within Insight.

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DASHBOARD   MY WORK   REPORTS   WORK PROFILES

6   Marley Sanders
UNDERWRITER

Acme Company
Risk # BZY - 123456

✓ Clear   ✓ Assess   3 Rate   4 Quote   5 Bind   6 Issue

+ Add Item

Exp
End
+ E
Cor
Ther
+ A

Schedule Email   ✕

Email Frequency   Email Template   First Send Date
Weekly   ⌄   Contingency Follow Up   ⌄   10/14/2018   📅

Save   Cancel

···
···
···

···

+ Send Email

My Links
Claim Center
SSL Forms

+ Add Link

Quote   Decline

Scheduled Emails
Users can schedule
automated contingency
reminder emails to be sent
at a set frequency until they
are closed.

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Marley Sanders
UNDERWRITER

Acme Company ⌄
Risk # BZY - 123456

✓ Clear   ✓ Assess   ③ Rate   ④ Quote   ⑤ Bind   ⑥ Issue

Exposure   +

Endorsements   −

20
Mandatory

10
Standard

5
Optional

1
Manuscript

+ Edit Endorsements

Contingencies   −

Category	Subjectivity	Status
Application Request ⌄	Names of their contract manufacturers and copy of agreement.	Open ⌄

+ Add Contingency

Quote   Decline

+ Add Item

‹ **Correspondence**

URGENT_Acme_Co_Submission.eml   …

URGENT_Acme_Co_Submission.pdf   …

URGENT_Acme_Co_Submission2.pdf   …

+ Add Correspondence

‹ **Scheduled Emails**

Frequency   Email Template

● Weekly ⌄   Contingency Follow Up ⌄   …

+ Send Email

My Links

Claim Center

SSL Forms

+ Add Link

Ready to Quote
After everything is completed in the Rate view, the user can move into the Quote phase.

Marley Sanders
UNDERWRITER

Acme Company ⌄
Risk # BZY - 123456

✓ Clear   ✓ Assess   ✓ Rate   ④ Quote   ⑤ Bind   ⑥ Issue

Quote Options

LIMITS ⌄		OPTION 1 ⌄	OPTION 2 ⌄	OPTION 3 ⌄
Notified Individuals	⊗	$300,000	$300,000	$300,000
Legal, Forensic and Public Relations	⊗	$300,000	$300,000	$300,000
Policy Aggregate Limit of Liability	⊗	$300,000	$300,000	$300,000
Additional Breach Response Limit	⊗	$300,000	$300,000	$300,000
Business Interruption Loss Resulting from Security Breach	⊗	$300,000	$300,000	$300,000
Business Interruption Loss Resulting from System Failure	⊗	$300,000	$300,000	$300,000
Dependent Business Loss Resulting from Dependent Security	⊗	$300,000	$300,000	$300,000
Cyber Extortion Loss	⊗	$300,000	$300,000	$300,000

Add Coverage ⌄

DEDUCTIBLE / RETENTIONS ⌄

+ Add Item

< **Correspondence**

📄 URGENT_Acme_Co_Submission.eml   •••
📄 URGENT_Acme_Co_Submission.pdf   •••
📄 URGENT_Acme_Co_Submission2.pdf   •••

+ Add Correspondence

< **Scheduled Emails**

Frequency   Email Template
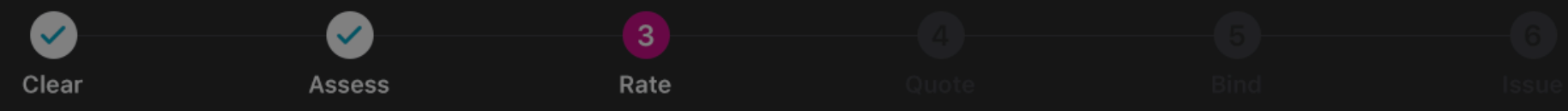● Weekly ⌄   Contingency Follow Up   •••

+ Send Email

My Links

Claim Center
SSL Forms

+ Add Link

INSIGHT™

DASHBOARD MY WORK REPORTS WORK PROFILES

🔍 🔔 6 **Marley Sanders**
UNDERWRITER

Acme Company ⌄
Risk # BZY - 123456

✓ Clear ✓ Assess ✓ Rate 4 Quote 5 Bind 6 Issue

Quote Options

LIMITS ⌄		OPTION 1 ⌄	OPTION 2 ⌄	OPTION 3 ⌄
Notified Individuals	⊗	$300,000	$300,000	$300,000
Legal, Forensic and Public Relations	⊗	$300,000	$300,000	$300,000
Policy Aggregate Limit of Liability	⊗	$300,000	$300,000	$300,000
Additional Breach Response Limit	⊗	$300,000	$300,000	$300,000
Business Interruption Loss Resulting from Security Breach	⊗	$300,000	$300,000	$300,000
Business Interruption Loss Resulting from System Failure	⊗	$300,000	$300,000	$300,000
Dependent Business Loss Resulting from Dependent Security	⊗	$300,000	$300,000	$300,000
Cyber Extortion Loss	⊗	$300,000	$300,000	$300,000

Add Coverage ⌄

DEDUCTIBLE / RETENTIONS ⌄

Chat Event Log

Anna Smith
Hey Marley, we'll need a manuscript endorsement for this risk. Should I go ahead and request it?
5 MINUTES AGO

Marley Sanders
That would be great. Thanks Anna!
4 MINUTE AGO

Anna Smith submitted a manuscript request.
1 MINUTE AGO

Type here to chat...

‹ **Open Items**

Date Opened	Type	
01/01/2019	Contingency	•••

➕ Add Item

‹ **Correspondence**

URGENT-Acme-Co-Submission.eml •••

Quote Worksheet
The Quote Worksheet is in "edit mode" by default. Users can easily copy and delete options, limits, and deductibles.

In-Line Editing
Users can easily add coverage and deductibles within the quote worksheet.

INSIGHT™

DASHBOARD   MY WORK   REPORTS   WORK PROFILES

Marley Sanders
UNDERWRITER

Acme Company
Risk # BZY - 123456

Clear — Assess — Rate — Quote (4) — Bind (5) — Issue (6)

Quote Options

LIMITS		OPTION 1	OPTION 2	OPTION 3	OPTION 4	OPTION 5
Notified Individuals	⊗	$300,000	$300,000	$300,000	$300,000	$300,000
Legal, Forensic and Public Relations	⊗	$300,000	$300,000	$300,000	$300,000	$300,000
Policy Aggregate Limit of Liability	⊗	$300,000	$300,000	$300,000	$300,000	$300,000
Additional Breach Response Limit	⊗	$300,000	$300,000	$300,000	$300,000	$300,000
Business Interruption Loss Resulting from Security Breach	⊗	$300,000	$300,000	$300,000	$300,000	$300,000
Business Interruption Loss Resulting from System Failure	⊗	$300,000	$300,000	$300,000	$300,000	$300,000
Dependent Business Loss Resulting from Dependent Security	⊗	$300,000	$300,000	$300,000	$300,000	$300,000
Cyber Extortion Loss	⊗	$300,000	$300,000	$300,000	$300,000	$300,000
Telephone Fraud	⊗	$300,000	$300,000	$300,000	$300,000	$300,000

DEDUCTIBLE / RETENTIONS

Legal, Forensic	Each Incident	Separate Retention for

Chat

Anna Smi
Hey Marle
endorsem
ahead and
5 MINUTES

Marley Sa
That woul
4 MINUTE A

Anna Smi
request.
1 MINUTE A

Type here

< Open Item
Date Opened   Ty
01/01/2019
+ Add Item

< Correspon

URGENT

Acme Company
Risk # BZY - 123456

Clear — Assess — Rate — **4 Quote** — 5 Bind — 6 Issue

Dependent Business Loss Resulting from Dependent Security	✕	$300,000	$300,000	$300,000	$300,000	$300,000
Cyber Extortion Loss	✕	$300,000	$300,000	$300,000	$300,000	$300,000
Telephone Fraud ▾	✕	$300,000	$300,000	$300,000	$300,000	$300,000

DEDUCTIBLE / RETENTIONS ▾

Legal, Forensic and PR	Each Incident and Claim	Separate Retention for Cyber						
$2,500	$2,500	$2,500	✕	$50,000	$100,000	$100,000	$100,000	$100,000
$2,500	$2,500	$2,500	✕	$300,000	$300,000	$300,000	$300,000	$300,000
$2,500	$2,500	$2,500	✕	$300,000	$300,000	$300,000	$300,000	$300,000

Add Deductible ▾

Send Quote   Decline

Chat

Anna Smi
Hey Marle
endorsem
ahead an
5 MINUTES
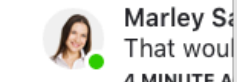
Marley Sa
That woul
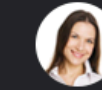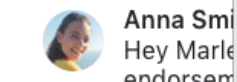4 MINUTE A

Anna Smi
request.
1 MINUTE A

Type here

Open Item

Date Opened   Ty
01/01/2019

+ Add Item

Correspon

URGENT

Automatic Bind and Issue
After an underwriter clicks "Send Quote," an email is automatically generated and sent to the broker with the quote as an attachment.

At this point, the broker has the option to review the quote, bind it, and issue the policy straight from a link inside the email.
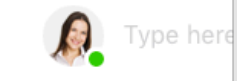
Beazley Quote for Acme Company

● **Marley Sanders**
● Anna Smith
Wednesday, September 12, 2018 at 11:34 AM
Show Details

Acme Company Quote.pdf

INS↑GHT

Anna Smith

We are pleased to inform you that we have prepared a quote for **Acme Company** for you based on our correspondence to date. Please find the quote attached. If you would like to discuss this further, please don't hesitate to reach out and contact me directly.

With our new **Insight** system you can review, then bind and issue a policy simply by clicking the link below.

Review, Bind, & Issue

Thank you!

Marley Sanders
Beazley Underwriter
marley.sanders@beazley.com
(555) 123-4567

beazley

Review, Bind, and Issue
After clicking the email link, brokers are taken to Insight where they can review high level policy details (or the policy itself) or bind and issue the policy themselves.

Risks with non-blocking contingencies would be handled the same way (with contingencies being shown on this screen).

Risks with blocking contingencies or outstanding manuscripts would not initiate automated bind and issue.

In-Line Chat
Brokers who have last minute questions or issues before binding can easily communicate in-line with the appropriate underwriters (or UAs) as necessary.

INSGHT™

Anna Smith
BROKER

Review, Bind, and Issue

Acme Company

View Policy   Bind & Issue

Policy #W18A86170301
Beazley Breach Response

Policy Details

Effective Date: 10/01/2018
Expiration Date: 10/01/2019
Premium: $3,500
BPI: 144.24%
Commission: 20%
Business Category: Surplus Lines

Insurance Structure: Primary
TRIA: Excluded
Manuscript: Yes
International Subsidiaries: Yes
FAC RI Purchased: No

Limits

NAME	VALUE
Limit of Liability Each Claim	$2,000,000
PCI Fines, Expenses, and Costs	$250,000
Policy Aggregate Limit	$4,000,000
Privacy Notification Costs	$1,000,000
Regulatory Defense and Penalties	$2,000,000

Deductibles

Chat with Marley
UNDERWRITER

Anna Smith
Hey Marley, quick question before I trigger the bind and issue... Can you tell me on which page of the quote I can find detail on PCI fines?
2 MINUTES AGO

Marley Sanders
No problem Anna, everything you need should be on page 8. Let me know if there is anything else!
1 MINUTE AGO

Anna Smith
Thank you!
1 MINUTE AGO

Type here to chat...

Bind & Issue Notification
The system notifies the underwriter that the broker initiated an automated bind and issue order, and the policy is officially issued.

INS↑GHT™

DASHBOARD   MY WORK   REPORTS   WORK PROFILES

Marley Sanders
UNDERWRITER

Today's To Do List

Enter a new to do here...

#Shell Group: Review newly submitted subjectivity documentation emailed by @Anna Smith at 9:02am today

#Pexels: Submit BRR quote to @Steven McQuaid by 3:05pm today

#ePay: Review newly submitted subjectivity documentation from @Dax Shepherd at 8:17am today

My KPIs   YEAR ⌄

$1.80M
OUT OF $2.40M

62.5%
GOAL: 60%

749
GOAL: 1,500

Total Net Premium   Hit Rate   Renewal Quotes

#Acme Company: @Anna Smith initiated a bind and issue order for policy #W18A86170301 at 3:40pm today.
15 MINUTES AGO

#David Motors: A scheduled contingency reminder email was sent to @Natalie Stevens at 3:00pm today.
22 MINUTES AGO

#Pexels: @Susan Friedman: "Hey @Marley Sanders, I've finished reviewing the contingencies that were sent this morning. We are good to proceed."
46 MINUTES AGO

#ePay: A binder has been automatically created and is ready to be sent to @Charles Jackson.
Send Binder
2 HOURS AGO

#Dunkin' Donuts: A new submission has cleared and has been assigned to you.
3 HOURS AGO

#David Motors: This policy is set to expire in 90 days. A renewal quote has automatically been created and sent to @Dandra Smith.
3 HOURS AGO

Workviews   EDIT ✎

New Business

6   Overdue 3   +

	ACCOUNT ⌄	SCORE	ID	SUBMISSION	MKT	PRODUCT	STATUS	STRUCTURE	UNDERWRITER	BROKER	EFFECTIVE	⋯
★	Shell Group ›	75	BZY-123456	09/04/18	PE	Breach Response	Rating	Primary	Marley Sanders	Executive Liability...	11/17/18	⋯
☆	Pexels ›	63	BZY-145356	09/03/18	PE	Breach Response	Rating	Primary	Marley Sanders	S.H. Smith & Com...	12/01/18	⋯
☆	David Motors ›	50	BZY-123666	09/03/18	PE	Breach Response	Rating	Primary	Marley Sanders	Executive Liability...	01/01/19	⋯
★	ePay ›	38	BZY-432546	09/03/18	PE	Breach Response	Rating	Primary	Marley Sanders	ECC Insurance Br...	02/01/19	⋯
★	Donaldson Elderid... ›	25	BZY-865465	09/03/18	PE	Breach Response	Rating	Primary	Marley Sanders	ECC Insurance Br...	02/01/19	⋯

Final Policy

The underwriter can view the final issued policy.

INS↑GHT™

DASHBOARD   MY WORK   REPORTS   WORK PROFILES

Marley Sanders
UNDERWRITER

Acme Company ⌄
Policy #W18A86170301

✓ Clear   ✓ Assess   ✓ Rate   ✓ Quote   ✓ Bind   ✓ Issue

Policy Details   ● Active

Bind Date:	10/01/2018	Business Category:	Surplus Lines
Effective Date:	10/01/2018	Insurance Structure:	Primary
Expiration Date:	10/01/2019	TRIA:	Excluded
Premium:	$3,500	Manuscript:	Yes
BPI:	144.24%	International Subsidiaries:	Yes
Commission:	20%	FAC RI Purchased:	No

Manage Policy   Manage Binder

Limits

Name	Value
Limit of Liability each Claim	$2,000,000
PCI Fines, Expenses and Costs	$250,000
Policy Aggregate Limit	$4,000,000

Chat   Event Log

Anna Smith
Hey Marley, we'll need a manuscript endorsement for this risk. Should I go ahead and request it?
5 MINUTES AGO

Marley Sanders
That would be great. Thanks Anna!
4 MINUTE AGO

Anna Smith submitted a manuscript request.
1 MINUTE AGO

Type here to chat...

‹ **Open Items**

Date Opened	Type	
01/01/2019	Contingency	•••

+ Add Item

‹ **Correspondence**

URGENT_Acme_Co_Submission.eml   •••

Final Policy
The underwriter can view the final issued policy.

III

ADDITIONAL CONCEPTS

Additional concept sketches to illustrate our thinking in other key areas

INSIGHT™

DASHBOARD   MY WORK   **REPORTS**   WORK PROFILES

6

Reese Taylor
UNDERWRITER MANAGER

Reporting
Users customize and view detailed reporting based on their roles and permissions. For example, managers can see the performance of their team and individual team members. Senior managers can see performance across products, teams, individuals, etc.

Multiple Views
Managers can toggle between viewing individual team members and aggregate team metrics.

Individual Underwriters ˅   YEAR ˅   EDIT ✎   EXPORT & SHARE

Show: All 16   Top Performers 3   Bottom Performers 3   Rapid Renewal 1   +

Total Net Premium ˅   Show: ☐ Average ☐ Goals

$6M $6M

$4M $4M

$2M $2M

$0 $0

Alyssa Pancho Bennett Arturo Harriet Sully Velvy Jeff Brutus Julius Chavez Anna Quaid Hawkins Dillon Kimball

☆	UNDERWRITER ˅	SCORE	NET PREM. (NEW)	NET PREM. (RENEWAL)	QUOTES (NEW)	QUOTES (RENEWAL)	DECLINES	BINDS (NEW)	BINDS (RENEWAL)	
☆	Alyssa Davidson	75	$2,984,200	$1,001,840	638	319	138	394	119	···
★	Pancho Edwards	85	$3,893,920	$1,101,390	893	505	201	535	201	···
★	Bennett Dutch	32	$893,010	$594,830	119	67	14	102	74	···

Multiple Visualizations
Users can easily toggle between multiple visualizations to get a clear picture of team performance.
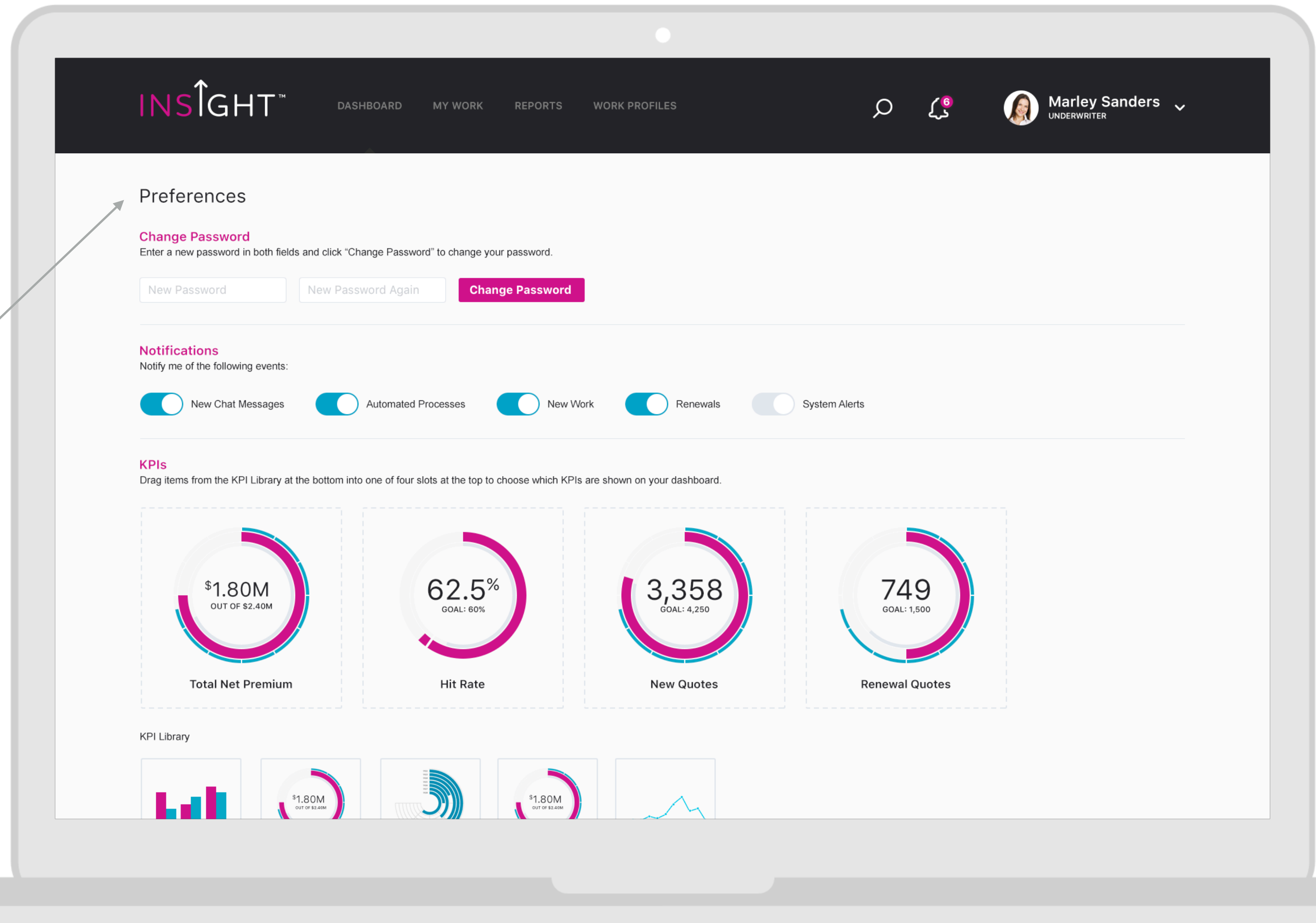
Filters
Managers can easily filter their teams to focus on top and bottom performers, Rapid Renewals, and more.

Employee Score
Employees are given an individual score that represents an amalgamation of KPIs, including total premium, hit rate, progress toward goal, etc. so that their manager has an immediate and clear view of overall performance.
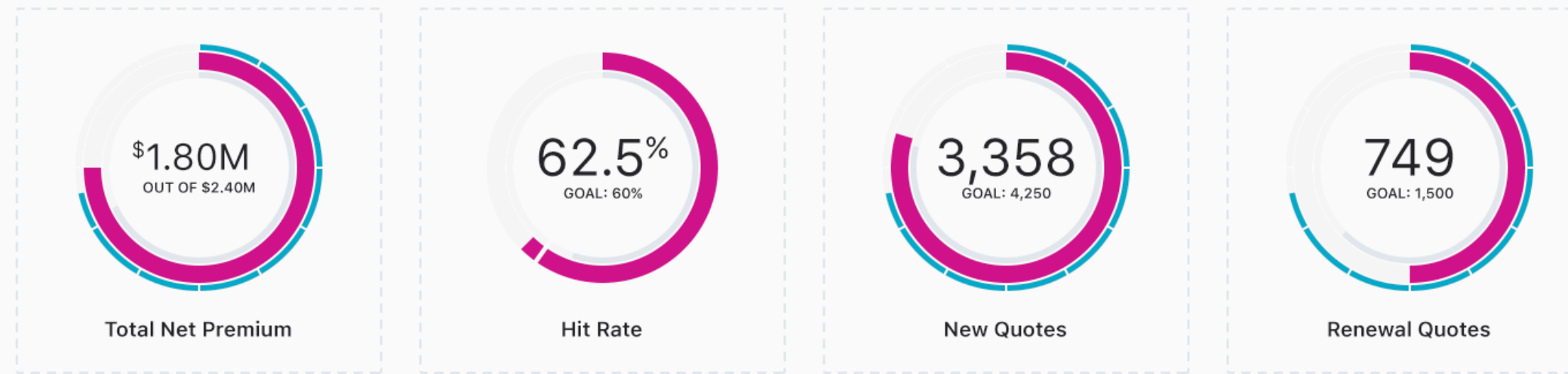
Preferences
Users can edit their preferences for an additional layer of flexibility and customization.

For example, they can change their password and choose which events trigger notifications.

INSIGHT™

DASHBOARD   MY WORK   REPORTS   WORK PROFILES

6

Marley Sanders
UNDERWRITER

Preferences

Change Password
Enter a new password in both fields and click "Change Password" to change your password.

New Password   New Password Again   **Change Password**

Notifications
Notify me of the following events:

New Chat Messages   Automated Processes   New Work   Renewals   System Alerts

KPIs
Drag items from the KPI Library at the bottom into one of four slots at the top to choose which KPIs are shown on your dashboard.

$1.80M
OUT OF $2.40M

62.5%
GOAL: 60%

3,358
GOAL: 4,250

749
GOAL: 1,500

Total Net Premium   Hit Rate   New Quotes   Renewal Quotes

KPI Library

$1.80M
OUT OF $2.40M

$1.80M
OUT OF $2.40M

Custom KPIs
Users can choose and order the KPIs they see on their dashboards from a role-specific KPI Library.

INS↑GHT™

DASHBOARD   MY WORK   REPORTS   WORK PROFILES

Marley Sanders
UNDERWRITER

New Chat Messages   Automated Processes   New Work   Renewals   System Alerts

KPIs
Drag items from the KPI Library at the bottom into one of four slots at the top to choose which KPIs are shown on your dashboard.
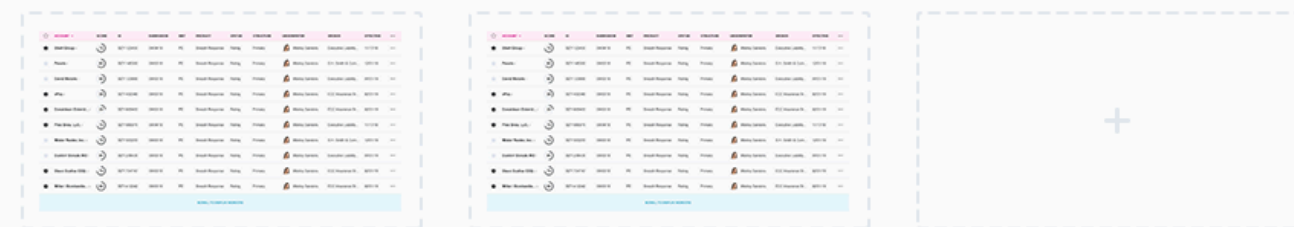
$1.80M
OUT OF $2.40M
Total Net Premium

62.5%
GOAL: 60%
Hit Rate

3,358
GOAL: 4,250
New Quotes

749
GOAL: 1,500
Renewal Quotes

KPI Library

Total Net Premium

$1.80M
OUT OF $2.40M
Total Net Premium

Total Net Premium

$1.80M
OUT OF $2.40M
Total Net Premium

Total Net Premium

Workviews
Edit existing workviews, add new workviews, or drag workviews from coworkers into the + slot to add them to your workflow.
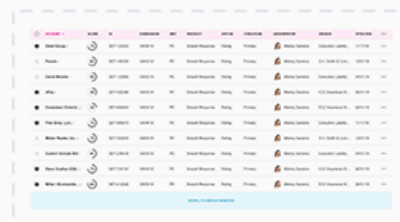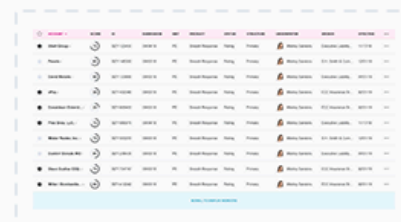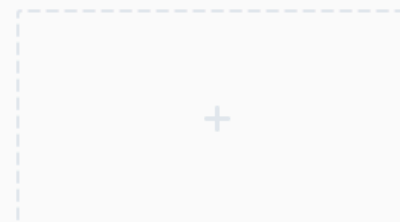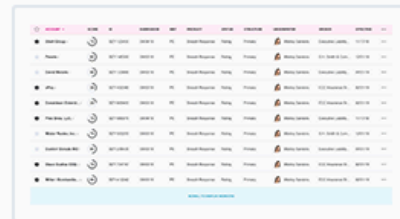
New Business

Renewals

Workview Customization
Workviews consist of defined data columns, column order, filters and more. Users create and edit their own workviews or add workviews from their teammates.

INS↑GHT™

DASHBOARD   MY WORK   REPORTS   WORK PROFILES

Marley Sanders
UNDERWRITER

Total Net Premium   Total Net Premium   Total Net Premium   Total Net Premium   Total Net Premium

Workviews
Edit existing workviews, add new workviews, or drag workviews from coworkers into the + slot to add them to your workflow.
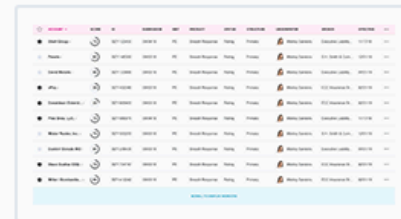
New Business
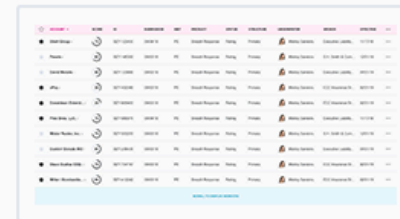@Marley Sanders

Renewals
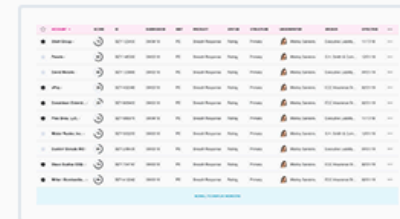@Marley Sanders

Team Workviews

Environmental Renewals
@Alyssa Davidson

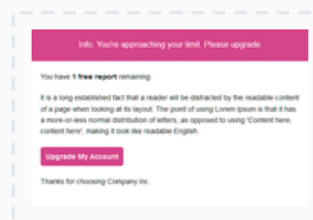**Environmental Renewals**
@Tom Howard

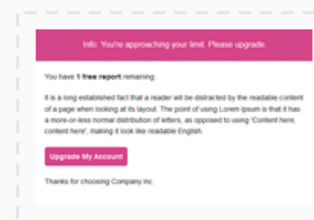**Environmental Renewals**
@Kurt McBride

Environmental Renewals
@Edward Novochek

Email Templates
Edit existing templates, add new templates, or drag templates from coworkers into the + slot to add them to your workflow.

Quote
@Marley Sanders

Contingencies
@Marley Sanders

@Marley Sanders   @Marley Sanders

Team Workviews

Environmental Renewals
@Alyssa Davidson

Environmental Renewals
@Tom Howard

Environmental Renewals
@Kurt McBride

Environmental Renewals
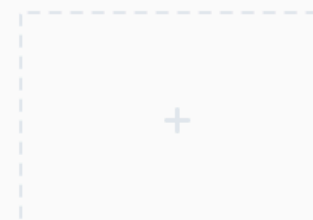@Edward Novochek

Email Templates
Edit existing templates, add new templates, or drag templates from coworkers into the + slot to add them to your workflow.

Quote
@Marley Sanders

Contingencies
@Marley Sanders

Team Templates

Renewal Reminder
@Alyssa Davidson

Custom Endorsements
@Jacob Danyetta

Email Templates
Similarly, users can create and edit their own email templates or add templates from their team.

Mobile Experience

Beazley employees who like to get ahead of things can plan out their days in advance while on the go with a complementary mobile experience that offers a refined subset of personalized functionality and information.
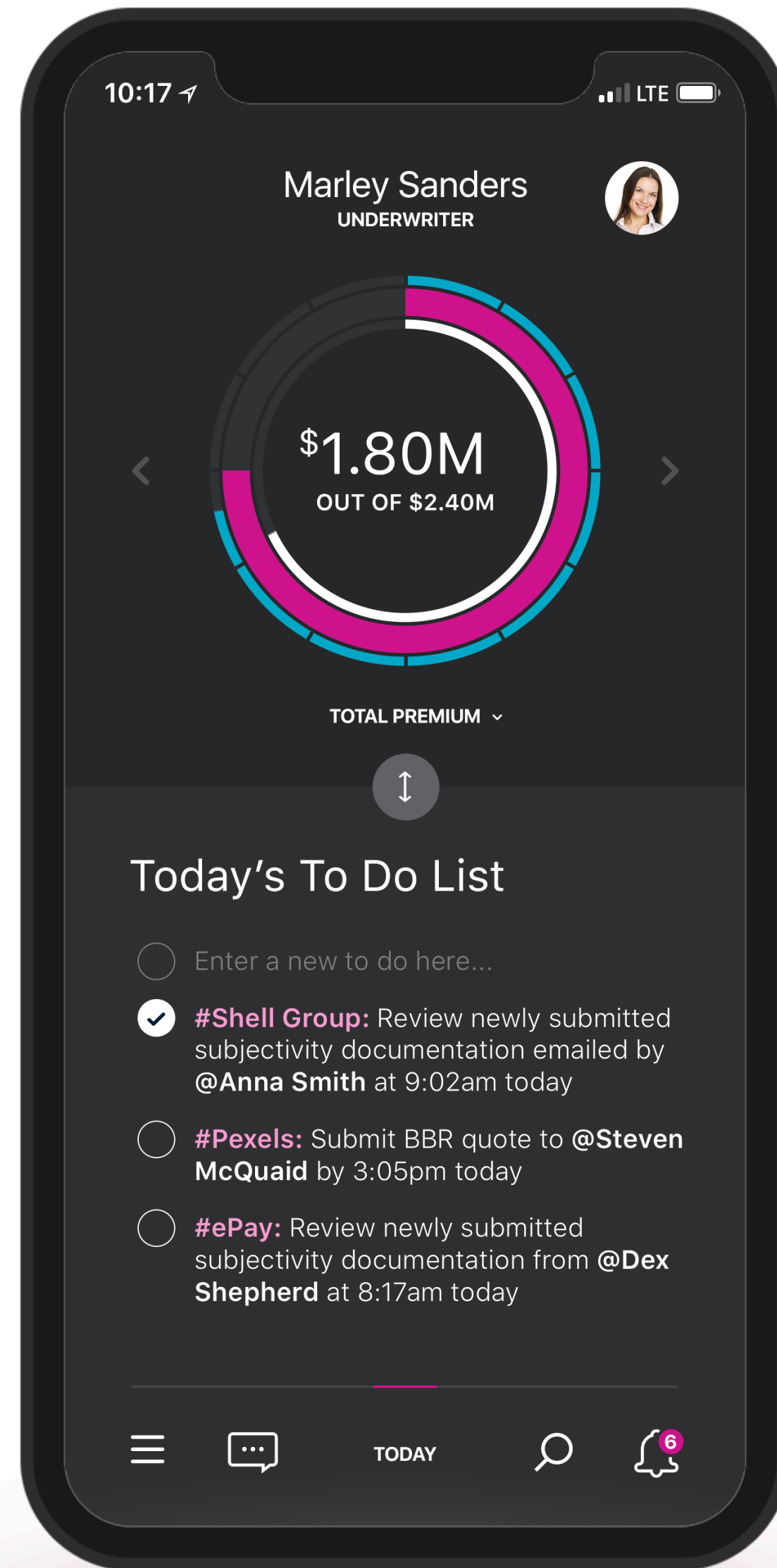
IV

CLOSING

A high level roadmap that illustrates
"how we get there"

Roadmap

Changing the entire flow of business can't happen overnight. A pragmatic, phased approach is the most effective way to maximize ROI and onboard users to a new way of working.

Phase 1

Critically examine all Beazley systems and jobs-to-be-done. Identify duplicative systems/data housing and create plan to consolidate where possible.

Begin scoping Insight to assemble and incorporate some of this data, as well as plan UI adjustments to accommodate new and enhanced functionality.

Create basic efficiencies by bringing quick access to common tools and web applications into Insight, saving time and effort.

Phase 2

Continue plans around consolidation and eventual turndown of non-critical systems and generate budgetary redirection of resources where possible to support the new business objectives behind workflow adjustment.

All integrated data is indexed to facilitate central view of truth for reporting capabilities.

Establish necessary API layers and data communication paths to allow all critical systems to be incorporated into a unified UI under Insight.

Develop architectural plans around automation of simpler tasks, with the understanding that complexity will follow.

Phase 3

Complete systems integration into Insight, matching existing design patterns and UX.

Implement automation of identified tasks. Evolve planning around enhanced automation and machine learning capabilities for future buildouts.

Leverage centralized data access and reporting capabilities to derive advanced BI and recognize critical decision making opportunities.

Continue iterative assessment of all systems and services to ensure alignment with ongoing business objectives.