



CAS-RPM Seminar

Competitive Analysis: Know the Data; Know the Market

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Working with the market leader

25,000

Agencies

1,000

Carriers

750

MGAs

22

State
governments

500,000

Insurance
professionals

We serve more insurance industry customers than anybody else.



Vertafore®

Get complete solutions for your whole business from one trusted vendor.



Platform-level solutions for
end-to-end efficiency



Targeted tools to conquer
your key challenges

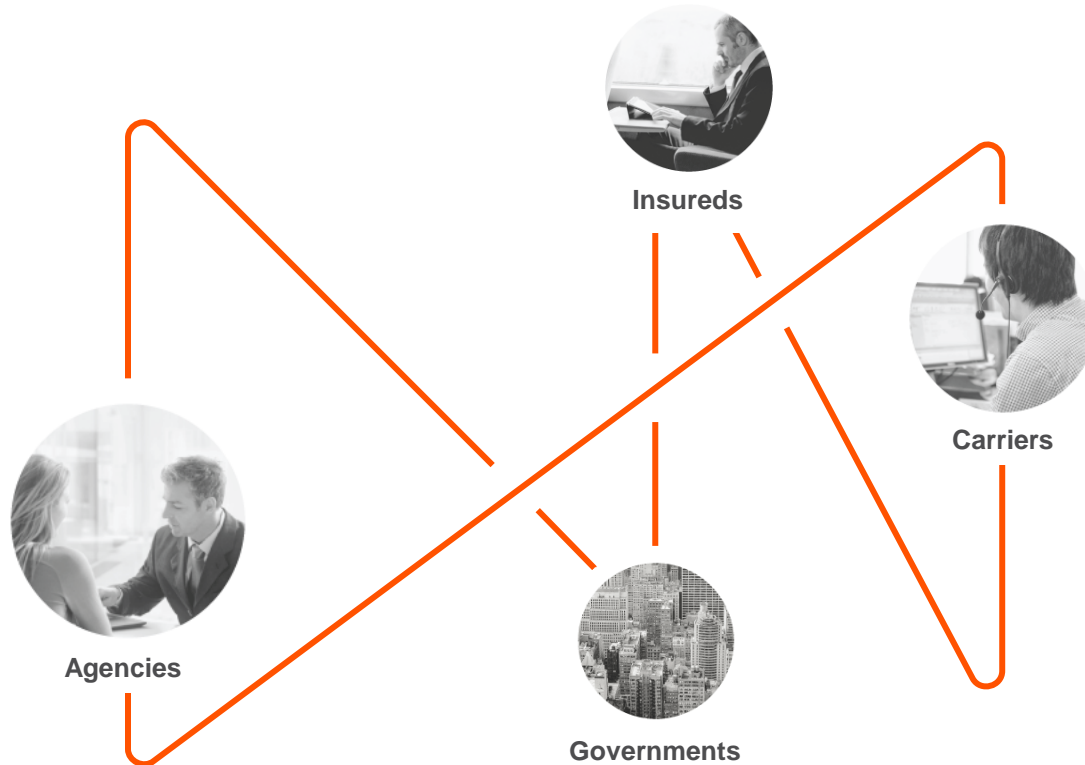


Research, rating, compliance, sales,
content management, workflow, and
agency management

Enabling connectivity

Connects agencies to National Producer Database and state rules to enable streamlined licensing

Connects agencies with carrier databases



Connects agencies to personal lines quotes from carriers

Connects customers to verify and request changes to coverage



200 million transactions annually



Real-time rating, research, and licensing



The latest, updated information to ensure you're always a step ahead of the competition

Breadth of data acquisition & distribution

- 10,000 agents are using our SaaS comparative rating tool for Auto & Home
- 200M transactions annually
- Direct real-time connections with all of the carriers in the independent channel
- Data is de-identified and aggregated into two distinct offerings
 - Aggregate Data
 - Market Basket
- Customers receive updates to the data monthly

Delivering Data for Analysis

Vertafore's PL Rater Quote Data

Overview

Aggregate Data

Market Basket Data

Delivering Data for Analysis

Vertafore's PL Rating Quote Data

Overview

Aggregate Data

Market Basket Data

Real-Time, Comparative Rater

- Personal Auto & Home
- 170+ Carriers across 48 states
- 200M transactions annually

Data Overview

- Compilation of market pricing data from all PL Rating transactions
- Provides Carriers information on where their rates stack up versus other Carriers
- One record equals an insured request for quote
- De-identified data
 - No carriers, agencies or consumers are visible

Delivering Data for Analysis

Vertafore's PL Rater Quote Data

Overview

Aggregate Data

Market Basket Data

Quote data is limited to quote transactions where you quoted

- Broken down by state, by LOB
- Both Personal Auto and Home
- Aggregated market pricing data
 - You can see only your premiums
 - Other premium volumes are aggregated – highest, lowest, average, median, mode, range
- Data can be integrated with Carrier data
 - Provides your Quote ID (Carrier Reference ID) so that you can dig deeper into the quote on your system

Delivering Data for Analysis

Vertafore's PL Rater Quote Data

Overview

Aggregate Data

Market Basket Data

Quote data across market

- Includes data even if you didn't participate in the quote transaction
- Does NOT include Carrier Reference ID
- Market pricing data for segmentation & analysis
 - Includes additional client, driver and vehicle data
 - Premium volumes – highest, lowest, average, median, mode, range
 - De-identified individual premium volume for all quote responses

Real-world market data for decision making



Enable analysis to answer business questions

- Am I making the right pricing decisions?
- How are consumers responding to pricing?
- Where do I have the biggest opportunity to improve my bottom line?
- How do I know our premiums are competitive?
- How is the market performing?
- What is the market potential?



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