



Launch New Insurance Programs With Greater Speed and Confidence

To expand products or enter new markets quickly, MGAs need to move quickly, evaluate opportunities confidently, and align carrier partnerships faster. Being prepared is crucial in winning business with carriers. Review this checklist in preparation for conversations with new carrier partners to ensure you are set up for success.

Evaluate the opportunity

- Is there a market for the risk?
- What is the anticipated size of the opportunity (size of market in region)?
- What is the competitive landscape?
- Identify customer pain points

Assess underwriting complexity

- Policy limits
- Exclusions
- Deductible range
- Premium range
- Is it an ISO program? If so, you will need to adhere to their rules and regulations.

Prepare for carrier alignment

- What forms does the carrier require?
- Underwriting questions
- Reports
- Appetite fit
- Submission readiness

Ensure compliance readiness

- Reporting
- State regulations
- Licensing, MGA and appointed agents
- Data/privacy standards

Completing this checklist may prove challenging, but there are resources to assist you.

ReferenceConnect AI for Carriers and MGAs is an AI-powered knowledge base tool that surfaces trusted underwriting guidance, appetite insights, and compliance information instantly, helping teams reduce manual research and move faster.



**Put instant
insurance expertise
at your fingertips.**

ReferenceConnect AI helps prepare teams to sell a new line of business (LOB) or work in a new geography

Expanding into a new program can be intimidating, because you and your staff must be knowledgeable enough to make a compelling carrier proposal and quickly go to market. As your trusted technology partner, we know this effort begins with solid research and training— with ReferenceConnect AI, you can make that process a breeze.

Get ready to sign with a carrier

Evaluate new program opportunities faster

Example: RoughNotes Research a Risk

Quickly assess the viability of new program opportunities with comprehensive risk intelligence in one place. Within each risk profile, users can:

- Gain a clear understanding of business operations and explanations associated with the risk
- Access recommended coverages, risk surveys, and industry classification codes
- Discover potential opportunities in target markets through integrated Google Maps search capabilities

Accelerate carrier and appetite alignment

Example: Carrier Appetites tool by Ask Kodiak

Quickly identify the right carrier and market fit for an opportunity. The guide helps users match risks to carrier appetites, reduce time spent researching market availability, and improve placement efficiency.

Standardize underwriting and onboarding readiness

Example: ISO Manuals, Forms, Rules, and Loss Costs

How to: ISO content helps to ensure consistent decision making, support compliance efforts, and reduce the time spent searching for critical underwriting and rating information. Users can access more than 170,000 ISO documents, including current countrywide and state specific manuals, rating plans, forms, plus historical editions dating back at least six years.

[Visit for more info](#)

or call 800.444.4813

ReferenceConnect AI delivers trusted insurance intelligence instantly

Instead of manually searching across multiple resources, underwriting and distribution teams can use ReferenceConnect AI to quickly surface appetite guidance, ISO information, underwriting considerations, and trusted insurance research from leading industry sources.

Scale underwriting expertise

Empower smarter underwriting decisions

Example: AM Best's Underwriting Reports

How to: Provide detailed descriptions and exclusive Underwriter's Checklists for more than 570 commercial and industrial classifications. You will quickly become familiar with every aspect of an industry and be able to evaluate exposure in all applicable lines of insurance, which is why Best's Underwriting Reports are the resource risk management professionals rely on to train new staff.

Support decisions with trusted insurance intelligence

Example: IRMI Insurance Law Essentials

How to: Support claims dispute decisions and help your clients get paid with essential tools for insurance coverage legal research. Quickly understand key coverage issues, litigation trends, case developments, and court opinions through expert analysis and practical legal guidance.

Ramp staff quickly to get the most out of ReferenceConnect AI

Example: Vertafore Professional Services Training

How to: Create self-service training for your staff within the Training tool. Here you can access live or on-demand courses to learn how to use ReferenceConnect AI, as well as tools and publications that benefit different initiatives, such as Research and Support Tools or Tools to Accelerate Commercial Lines Growth. You can also publish proprietary content to expedite onboarding when hiring.



Powered by trusted industry sources

View the list of **75+ trusted** industry sources that ReferenceConnect AI brings to your organization.

ReferenceConnect AI helps MGAs and underwriting teams move faster, onboard smarter, and scale distribution with confidence.

[Visit for more info](#)

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Ready to take the next step?

Contact us or call **800.444.4813**