

Provide your clients with the digital experience they expect.

RiskMatch is an insurance intelligence solution that provides you with the data-driven insights you need to grow your business and stay competitive in an increasingly complex industry. With RiskMatch, you get the most comprehensive data available today about your business, your customers, and the insurance marketplace.

With over \$135B of in-force premium, it supplies better recommendations, identifies specific revenue opportunities, and informs executive decisions resulting in increased growth and better relationships with customers and carriers.



Some customers have seen*

- A 50% increase in executive reporting efficiency
- 7% increase in retention rate
- A 1% increase in direct commission rates
- Two additional cross-sell deals per producer/year

*Based on customers surveyed in March 2018.

- **Make more informed executive decisions:** As your agency grows, understanding what is going on beneath the surface becomes more important and more challenging. RiskMatch extracts the data from your agency management systems regardless of type, then structures it using machine learning and enriches it with 3rd party sources. Your data is consolidated into a clean, consistent graphical format that provides real-time, detailed, role-based insights allowing you to make data driven decisions.
- **Identify opportunities for growth:** RiskMatch supports agency growth objectives including better cross-selling and winning more new business. Benchmark clients' coverage with similar businesses to provide smarter options and increase cross-sell opportunities. Leverage industry knowledge to present the right products to prospects, with the right sales tools allowing you to foster long-term organic growth.

- **Analyze and maximize retention:** RiskMatch helps you improve retention by utilizing machine learning to provide policy level risk assessments and historical benchmarking so you can make informed decisions on retention strategy. It also provides cross-selling insights to help you strengthen customer loyalty.
- **Become a trusted advisor:** RiskMatch helps you provide your clients with a complete presentation of risks and coverage choices based on data from insureds with similar profiles. Create data-driven sales presentations that include insights about a prospect, their industry, and their risks. Get instant intelligence about your customers, allowing you to improve customer retention and satisfaction.

"RiskMatch provides tools and resources to expand our relationships with insurers, accelerate our solution development capabilities, and drive efficiency in our insurance placement transactions."

Mike Goldman,
COO, NFP

[Visit for more info](#)

FEATURES YOU NEED



See your entire business in one place — by office, producer, product, industry, carrier and premium band. View normalized, structured, and enhanced company data in the **Manager Dashboard**, allowing you to foster long-term organic growth.



Understand the trends that are affecting your business' revenue with the **Revenue Drivers Module**. Explore what is influencing your revenue streams and the type of business that is helping or hurting. Develop a business strategy for growth, informed by real-time insight.



Analytics in Your Inbox sends actionable insights directly to your email which can help you generate more commission, increase product sales, and improve client retention. Know in advance which customers have upcoming renewals, compare your commission rates to others in the market to recognize uplift potential, and easily identify other coverages your customers are likely to purchase.



Cross Sell module gives you a quick view of the additional products that customers should have but don't. Filter accounts to identify coverage gaps and cross-sell opportunities based on risks they should be covering, helping you increase revenue.



Retention Prediction utilizes machine learning to provide a forward-view of your specific policies most at risk of not renewing and provides a view of your agency policy turnover experience compared to the market allowing you to adjust your sales and retention strategies to improve retention and grow revenue.



Create compelling proposals that demonstrate your value as an advisor with the **Benchmarking Report**. Show your customer the average premium, deductible, limits, and more for a specific policy. In this way they see not only what coverages they should consider, but limits and premiums. Generate proposals that include industry-wide benchmarking to effectively place your customers' risk with the ability to compare coverage pricing, limits, markets, and commission rates to the entire industry.



With RiskMatch's **Potential Enhanced Revenue Report** you gain customized insight into your current commission rates for upcoming renewals compared with market averages on a customer basis. Use this report to instantly identify uplift potential.



Be a trusted advisor showing your customer the coverages they should be considering based on what similar customers have bought. **The Risk Profile Report** quickly generates a preformatted, interactive proposal for your clients that shows your agency's expertise and coverages that the client should consider purchasing.



Gain insights into the performance levels of your markets in the **Market Relationships Module**. Discover which markets, both carriers and intermediaries, have lower shares in your business, and use this information to make the best consolidation decisions and optimize your existing market relationships.



The **Producer Dashboard** delivers a comprehensive overview of your customers in one place. Explore your portfolio by industry or go to your client list and drill down to a single client's profile and view upcoming renewals, exposures and cross-sell opportunities then shift to view information on carrier appetites. Helping you improve customer service and grow revenue.