



Case Study

Who

Regional Commercial Insurer

The Challenge

Insurer experienced an increase in 3rd-party claims. Underwriting and Risk Control leaders were seeking a solution to improve visibility into activity between renewal periods.



[Read The Full Case Study](#)

The Solution

Insurer implemented Portfolio Insights to obtain a single view of their entire portfolio and assess the risk of all covered drivers. With the client's shared view, they could drill into pockets of concentrated risk for more impactful consultation and risk mitigation.

The Results

3.6%
Flagged for proactive review, allowing them to intervene before a claim occurs

\$125K
Saved in underwriter hours by automating activity checks

50%
Reductions in violations in the first 6 months

Full Roster Visibility
9k+
Drivers and 300+ Insureds

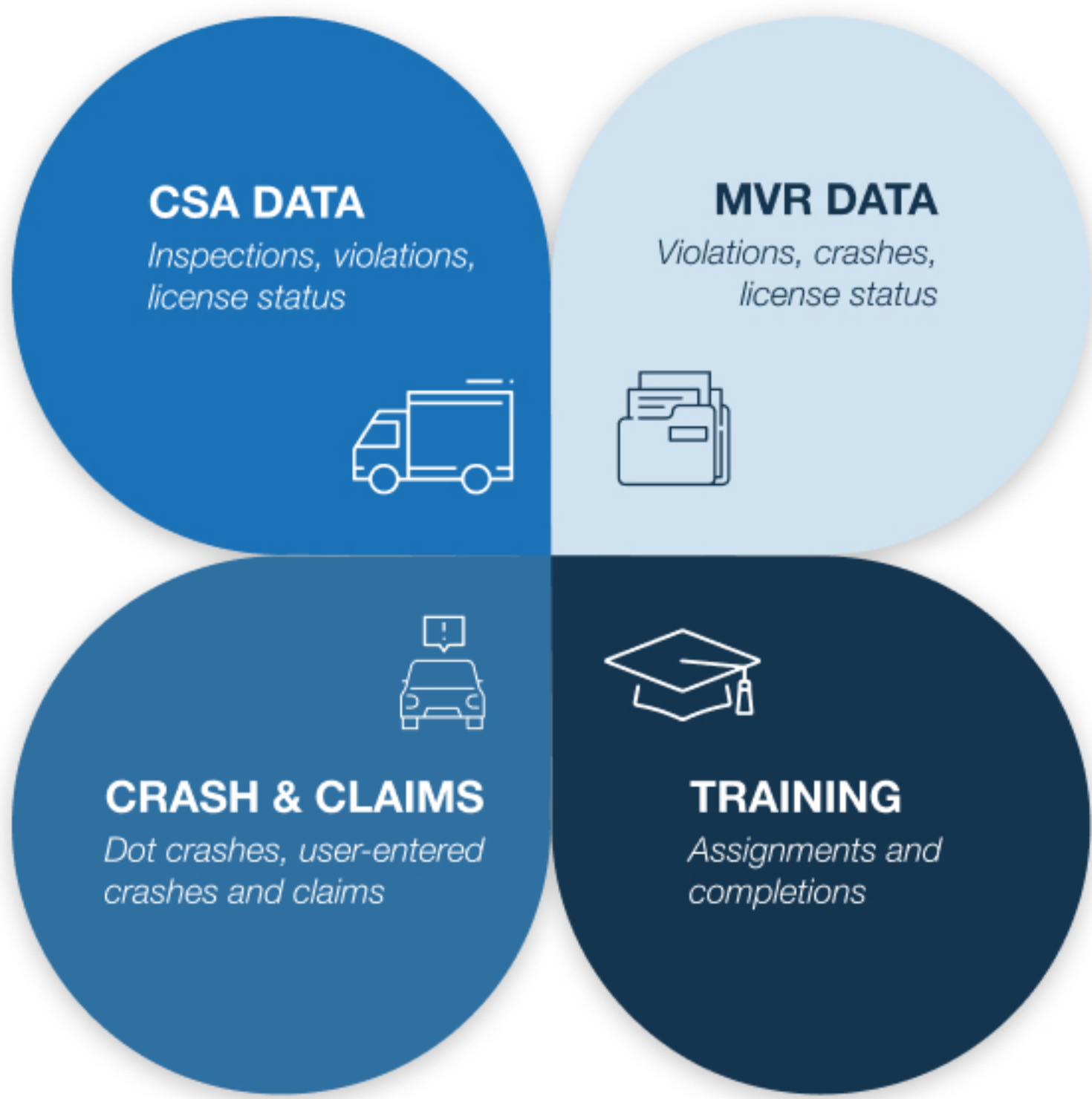
Portfolio Insights

Streamline Risk Mitigation with Total Portfolio Visibility in One Tool

What if you could empower your clients to proactively manage risk and reduce claims frequency? With SambaSafety's Portfolio Insights, you gain complete visibility into your monitored commercial clients in one place. Intuitive dashboards identify concentrated risk areas and drill into policyholder profiles. Stay informed with real-time, client-maintained rosters throughout the policy duration.

Portfolio Insights offers a comprehensive solution for managing policyholder risk, providing a unified platform consolidating critical information. Centralize MVRs, training assignments, crash and claims data, and CSA data into a single, user-friendly platform. Get a holistic view of your risk portfolio with the ability to delve into concentrated risk details and take strategic action.

See How Portfolio Insights Provides Unparalleled Visibility and Risk Management



Find Your Answers Fast

- Combines data from all connected sources
- High level overviews to inform focus
- Filter and drill to focus on accounts, groups, time frames, individuals
- Simple to export data or ready-made charts
- Trigger alerts, schedule email reports



Measure Responsiveness and Accuracy:

Track your clients' commitment to safety by monitoring how quickly users are closing high-priority alerts or how often they are logging in. Ensure data accuracy and optimize workflows for your risk management team to focus on the right accounts. By identifying negative trends early, you can prevent future losses by proactively assisting higher-risk accounts with preventative action or training.



Unlock Account-Level Visibility with Powerful Filtering Abilities:

Analyze aggregated data with account-level segmentation, using criteria like territory, P&L, underwriting teams, industries and SIC codes. This saves time and enhances your operational insights, leading to more informed decision-making.



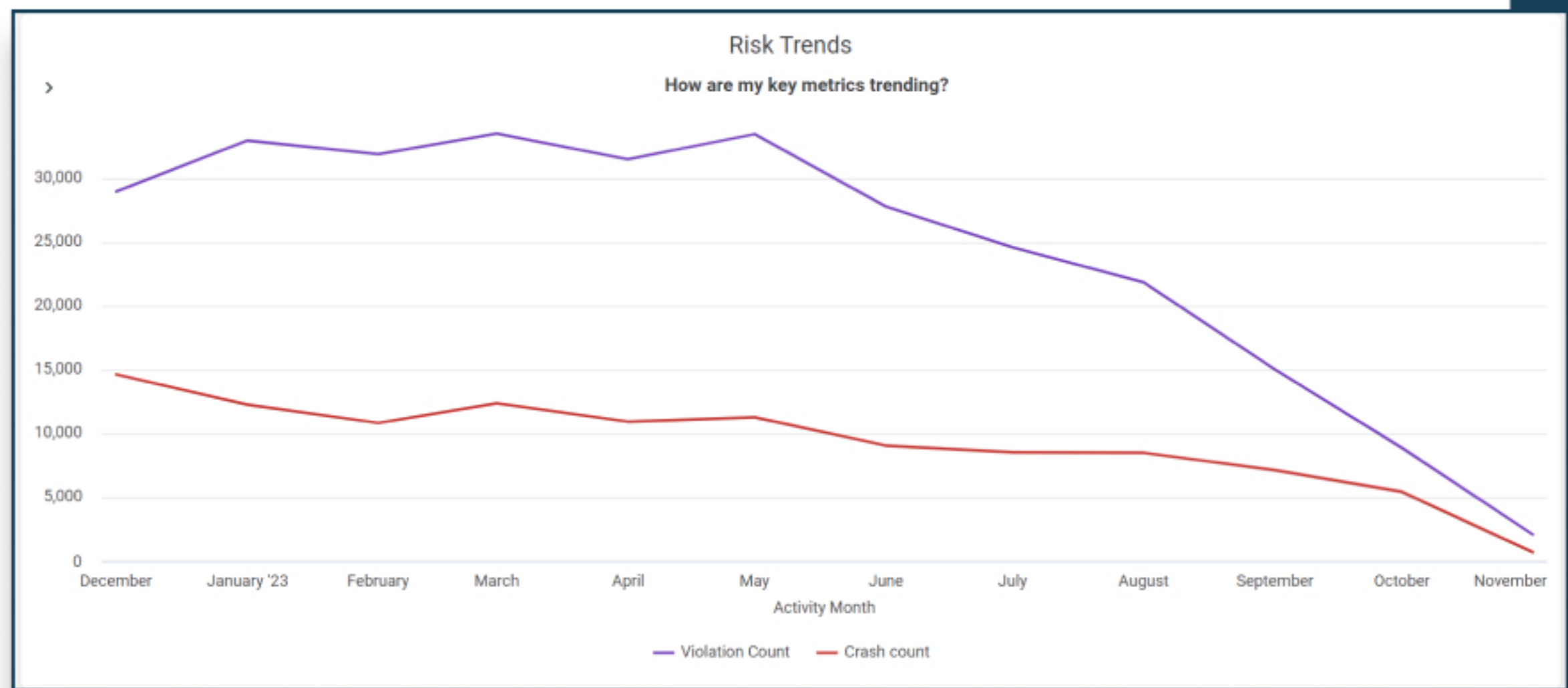
Stay Informed with Real-Time Dashboards:

Access a continuous flow of data with intuitive dashboards, ensuring you always have current insights on your policyholders at your fingertips. With automatic alert notifications, our platform instantly informs you by sending live email warnings. You can also opt for monthly reports delivered conveniently to your inbox giving you flexibility while maintaining access to real-time updates.



Discover the Future of Risk Assessment:

Proactively target risk with customizable filters to analyze leading crash indicators for specific accounts or your entire portfolio. This empowers you to anticipate potential risks and take proactive measures, giving you a glimpse of tomorrow's risk today.



By implementing SambaSafety's monitoring and analytics capabilities across their commercial auto portfolio, insurers often achieve a substantial reduction in violations and crashes.

See How Much You Can Save