



**Advisen Online Platform**  
**Version 10.6.0**  
**Release Notes**



*May 30, 2016*

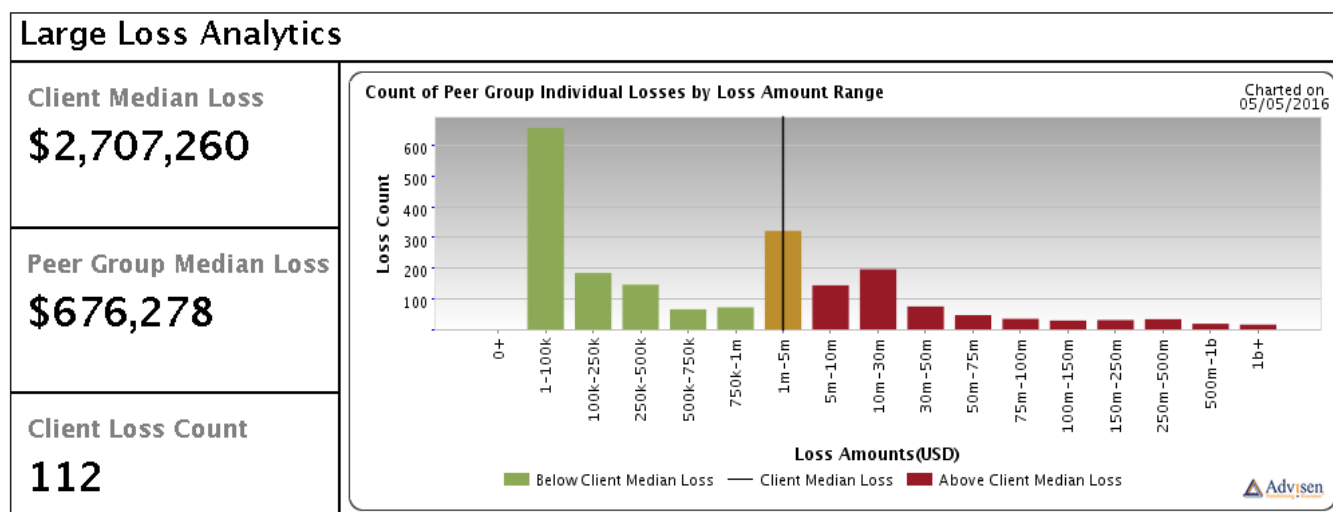
## What's New and Improved

On May 30<sup>th</sup>, 2016, Advisen is introducing a new series of graphical analytics that will help brokers and their clients make knowledgeable decisions on insurance program limit and retention purchases.

### New – Compare your client's loss experience to its peers

Our Large Loss Analytics chart allows you to understand how your client's risk profile compares to its peers, supporting a more informed selection of an appropriate insurance limit.

Previously, producers and account executives had to review an assortment of losses to make anecdotal comparisons regarding a client's loss experience and level of risk. Now, that information can be viewed quickly and quantitatively to make more informed recommendations.

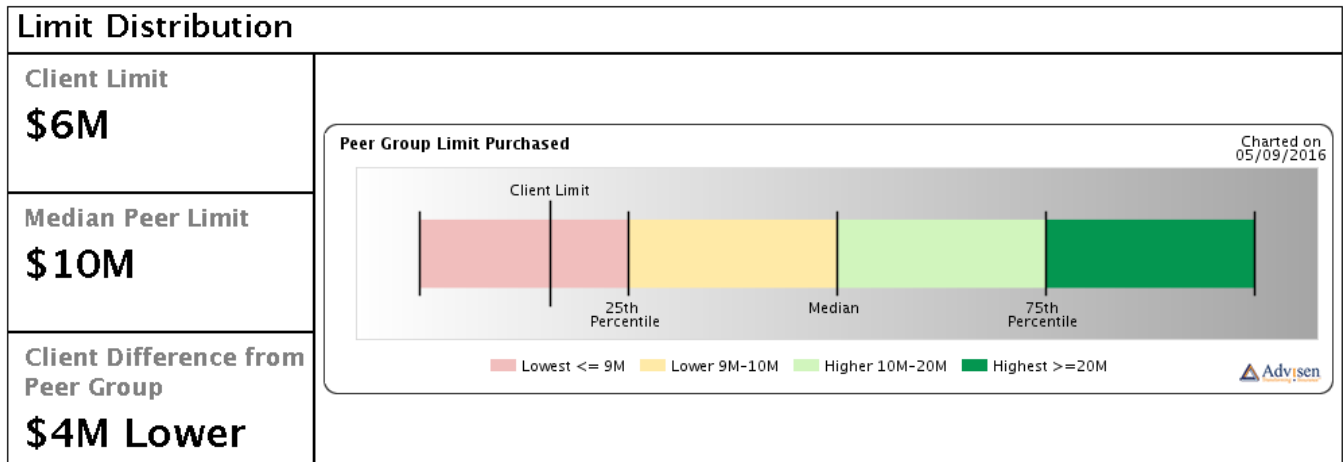


This chart displays the loss counts and amounts of the selected company (black line) and its peer group. Example chart shows the number of losses and amounts for the client company. Anything below is in green and above is in red.

## New – Drive client discussion on limit purchase decision

Our Limit Distribution chart offers improved program benchmarking limit metrics to validate your purchasing recommendations.

Insurance buyers and brokers can now easily see if the current limit is high or low and by how much without having to read the details of a chart and perform manual calculations.

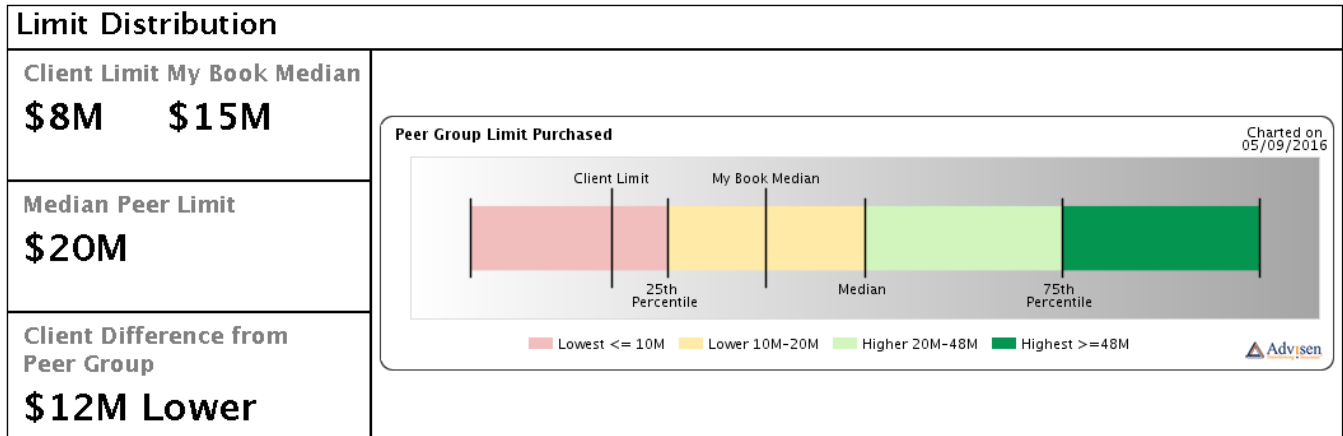


This chart displays the program limit purchased by the selected company (black line) in comparison with its peer group. In the above chart, client has purchased lower limits when compared to its peer.

## Demonstrate how your industry knowledge benefits your clients

Differentiate your expertise from the competition by showing prospects and clients how you've recommended the most appropriate limit selections.

Rather than making generalized claims on your website, you can substantiate your market position with external examples.

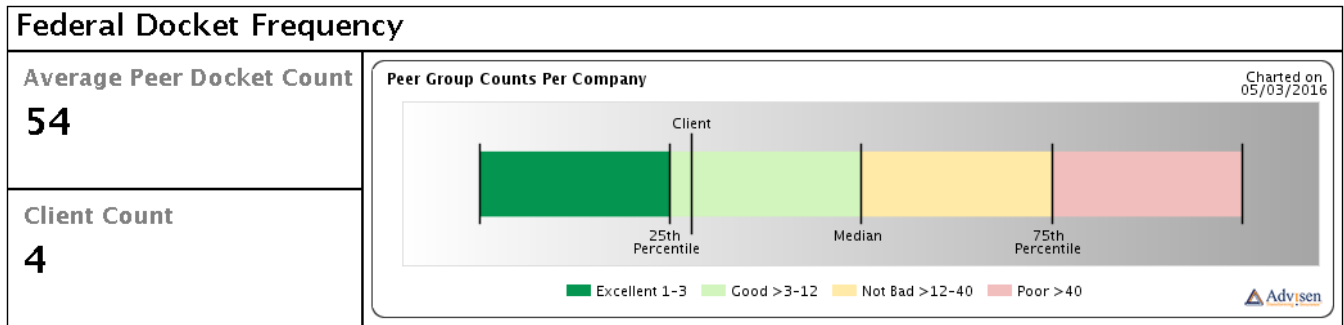


In addition to the client limit comparison to the peer group, this chart shows the median limit for the brokerage's entire book represented as the value and black line labeled My Book Median.

## New – Does your client have a high litigation frequency?

Our Federal Docket Frequency chart displays your client's litigation history to help recommend an appropriate insurance retention.


Instead of a list of court cases that alone provide very little insight about a buyer's frequency risk, a broker can assess the situation in one glance.



This chart displays count of frequency losses for the peer group of the selected benchmark company (black line). In the above chart, client is experiencing fewer lawsuits compared to its peers.


## New – Client Insight “Reports on Demand” order page


The Client Insight “Reports on Demand” [order page](#) has been updated with a new look and feel. The Renewal and New Business report order forms have been combined into one. Additionally, users can now order Industry Program Benchmark Reports.




### Client Insight Order Form

#### About You

 Name\*

 e-mail\*

 Phone\*


#### Report Option


☐ Include Company Information


☐ Include Loss Benchmarking & Placement Analytics  
(Available to Client Insight Expert Customers. [Learn More](#))


**Estimated Report Delivery Time:**  
**Up to 2 Business Days**


#### About the Insured


 Insured Name\*


 Website\*


 Address\*


 City\*

 State\*


 Industry\*


 Company Type\*


 Annual Revenue\*


 Employees\*

#### Optional

 SIC Code

 DUNS #

 Market Capitalization

 AMF # (Advisen Master Files)

## How do I find the new features?

### New – Compare your client's loss experience to its peers

Once you are logged in, go to "Benchmarking" and select "Large Losses (MSCAd)". Pick the "Distribution Charts" by selecting "Each Individual Loss", which is enabled for "Create Your Own" option. See below screenshot.

The screenshot displays the Advisen Benchmarking - Losses interface. The navigation menu on the left includes options like 'My Advisen', 'Prospecting & Peer Groups', 'Templates & Work-ups', 'Benchmarking', 'Loss Analysis', 'Policy Comparisons', 'Policy & Program Mgmt', 'Research', and 'News'. The main content area is titled 'Benchmarking - Losses' and includes sections for 'Loss Data to use', 'Benchmark Company', 'Loss Characteristics', and 'Chart Display Options'. Key features highlighted with red boxes include: 'Large Losses (MSCAd)' in the 'Losses' dropdown, 'Create Your Own' in the 'Benchmarking Reports' section, 'Distribution Charts' in the 'Analytics to Chart' section, 'Median Loss Amount' in the 'Distribution Charts' dropdown, and 'Each Individual Loss' in the 'Calculated Based on' dropdown.

## New – Drive client discussion on limit purchase decision

Once you are logged in, go to “Benchmarking” and select “Advanced”. Pick the “Limit Quartile” chart by selecting “Create Your Own Benchmarking Report” option. See below screenshot.

The screenshot displays the Advisen Benchmarking Advanced Policy/Program interface. The left sidebar contains 'Tools' and 'Benchmarks' sections. The top navigation bar includes tabs for 'My Advisen', 'Prospecting & Peer Groups', 'Templates & Work-ups', 'Benchmarking', 'Loss Analysis', 'Policy Comparisons', 'Policy & Program Mgmt', 'Research', 'News', and a help icon. The main content area is titled 'Advanced Policy/Program'. A dropdown menu for 'Policy/Program' shows 'Advanced' selected. Below this, the 'Filters & Program Details Selected for Company Profile' section is visible. The 'Create Your Own Benchmarking Report' checkbox is checked. Under 'Amount Distribution Charts', the 'Limit Quartile' option is selected. The 'Filter Benchmarking Record Range' section shows 'Include: From \$' and 'To: \$' fields. The 'Graph Display Options' section has 'Graph as a Single Peer Group' selected. The 'Median & Average Calculated Based on' section has 'Entire Peer Group' selected. The 'Peer Group Data' section has 'Use Advisen Aggregate' checked. At the bottom, the 'Graph Count' states 'Your selections will generate 1 Benchmark Graphs'.



## Demonstrate how your industry knowledge benefits your clients

Once you are logged in, go to “Benchmarking” and select “Advanced”. Pick the “Limit Quartile” chart by selecting “Create Your Own Benchmarking Report” option. Compare it with your book by clicking on “Use Your Book of Business”. See below screenshot.

The screenshot displays the Advisen Benchmarking Advanced Policy/Program interface. The navigation bar at the top includes tabs for My Advisen, Prospecting & Peer Groups, Templates & Work-ups, Benchmarking (selected), Loss Analysis, Policy Comparisons, Policy & Program Mgmt, Research, and News. The left sidebar contains filter selection categories: Industry, Company Type, Revenues, Location, Time Periods, Coverage, LOBs, Prog. Characteristics, and My Peer Group. The main content area is titled 'Advanced Policy/Program' and features a dropdown menu with options: Advanced, Express, Losses, Large Losses (MSCAd), Frequency Losses (Dockets), ADVx, ADVx Composite - Large, Account, Umbrella/Excess-MM, Workers Compensation-MM, General Liability-MM, and Directors & Officers-MM. Below this, the 'Filters & Program Details Selected for Company Profile' section shows radio buttons for 'Program' and 'Insurer Price'. The 'Create Your Own Benchmarking Report' checkbox is checked. The 'Analytics to Graph' section has radio buttons for 'Amount Distribution Charts' and 'Rate Distribution Quartile Charts'. Under 'Amount Distribution Charts', 'Limit Quartile' is selected. The 'Filter Benchmarking Record Range' section has 'Content Characteristics to Filter' set to 'None'. The 'Graph Display Options' section has 'Graph as a Single Peer Group' selected. The 'Display Other Graph Indicators' section has 'Average' selected. The 'Median & Average Calculated Based on' section has 'Entire Peer Group' selected. The 'Peer Group Data' section has 'Use Advisen Aggregate' and 'Use RIMS Aggregate' checked. The 'Use Your Book of Business What's This?' checkbox is checked. The bottom status bar indicates 'Graph Count: Your selections will generate 1 Benchmark Graphs'.

## New – Does your client have a high litigation frequency?

Once you are logged in, go to “Benchmarking” and select “Frequency Losses (Dockets)”. Pick the “Distribution Charts” by selecting “Create Your Own” option. See below screenshot.

The screenshot displays the Advisen Benchmarking - Losses interface. The sidebar on the left contains navigation links: Tools, Company Profile, Industry, and Loss Characteristics. The main content area is titled "Benchmarking - Losses" and includes a "Loss Data to use" section with "Large Losses" selected. Below this, there are sections for "Analytics to Chart" (with "Distribution Charts" checked), "Chart Display Options", and "Define Values to Display". The "Distribution Charts" section is highlighted with a red box, and the "Loss Count Frequency" option is also highlighted.