



Premium Logic Sales Proposal

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Better decisions, better conversations, better outcomes.



Premium Logic is a business intelligence company that specializes in partnering with independent insurance agencies to provide the *customized* insights needed to fuel accelerated growth and profitability.



The Challenge

Analytics have become table stakes in this data driven world. With most agency management systems not built to address this need, independent insurance agencies trying to solve this problem are finding:

- ✔ 'One size fits all' platforms that are designed for provider scalability as opposed to client flexibility.
- ✔ Cost prohibitive solutions that are designed for larger agencies/budgets
- ✔ Solutions designed by tech companies vs industry experts that understand the true use cases needed to grow profitably

As a result, agencies are forced to settle, or to continue spending excessive time cobbling together 'good enough' reporting in Excel.



THE SOLUTION

Introducing Portal One, Powered by Premium Logic

Portal One is the first business intelligence platform built by agency owners, for agency owners. Combined with the industry expertise and consultative approach of the Premium Logic team, Portal One has changed the game for independent insurance agencies looking to transform from a data generating business to a data-powered business.

The Premium Logic team takes the time to get to know your specific agency so they can tailor the dashboards to exactly what your agency needs, throughout the life of the partnership.



Through the customized insights in Portal One, Premium Logic clients are:

- ✓ Having more dynamic, actionable 1x1's with teammates
- ✓ Making higher ROI decisions
- ✓ Experiencing accelerated growth and profitability



The Pillars of Portal One



Customized For Your Agency

You run your agency uniquely, so why would you use the same analytics platform as the agency down the street? We will do the customization for you, up front and ongoing, so you have a tool that adapts and evolves to you, and not one that you need to 'fit into'.



Intuitive Experience

Portal One was designed around real leaders seeking the insights needed to grow, and grow profitably. As a result, Portal One allows agency owners and leaders to have the most valuable insights, all within just a few clicks.



Best-In-Class Technology

A fully functional mobile app for leaders on the go, comprehensive drill down capability for leaders who want to understand their numbers, real-time dynamic filtering, and world class security through Microsoft Azure highlight a longer list of capabilities of the technology that Portal One leverages to be able to support even the most dynamic agencies.



Cost Effective

We're priced for the small to mid-size agency looking to level the playing field against national brokers who spend millions in analytics. Portal One has several different solutions that meet agencies where they are from a budgetary perspective, while not compromising on the most valuable analytics.



Design Overview

As agency owners ourselves, we found that we were most successful when we were centered around 4 key relationships:

- ✔ Agency Leadership
- ✔ Sales and Service Teams
- ✔ Carriers
- ✔ Clients

Portal One is designed around these relationships, and the insights needed to understand, develop, and optimize each of them.



Agency Performance

A heat map for agency growth & profitability.

Take the guesswork out of knowing where you and your leadership team need to divert their focus to remove the most inhibitive barriers on agency growth and profitability. Drill down from summary measures to quickly uncover root causes that need remediated.

Key insights:

- ✔ Year over Year Performance Summary
- ✔ Rolling 12 Month Analytics
- ✔ Premium/Revenue Banding
- ✔ Retention
- ✔ Historical trending



“By better understanding our revenue bands, we saved 50k by optimizing our service of lower revenue accounts that were previously costing us double to service due to our blanket application of x clients per account manager.”



Trent Dailey

CEO, Insurance Management Group



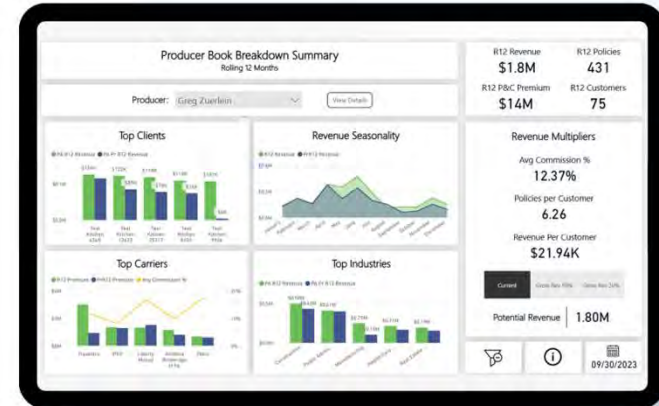
Team Development

Premium Logic unlocks truly dynamic one on ones with scoreboards that crystalize performance and enable collaboration.

Your team is the lifeblood of your agency. They represent you to your clients. The development of your team is the most important step to your agency achieving its long-term goals.

Key insights:

- ✔ Producer & Service Scoreboards
- ✔ Account Manager & Producer Book Analysis
- ✔ Workload Management & Seasonality
- ✔ Staff Performance Rankings



“With insights into our seasonality, we were able to shift accounts around and eliminate the need to hire an additional staff member, saving us over 60k.”



Tom Montileone
CEO, BPJ Insurance



Carrier Optimization

Don't take their word for it.

Carriers often want to show you their data and talk about how you are performing for them. Premium Logic gives you the carrier insights needed to change that conversation to how that carrier is performing for you, and what they need to do in order to be competitive for your agency.

Key insights:

- ✔ Carrier Commission Summary
- ✔ Carrier Spotlight
- ✔ Carrier Stack Rankings
- ✔ Contingency Dashboards



“A carrier recently came in with ‘their’ version of the data and shared concerns with us that we were below state averages. ‘Our’ version of the data showed that they were the only PL carrier in our top 10 who was down year over year due to unprecedented pricing increases and lack of new business appetite. **It completely changed the tone of the conversation** and reinforced the importance of a mutually beneficial relationship.”



Andy Priesman

Owner, Greenway Insurance



Client Maximization

Don't leave premium on the table.

Selling is serving. Clients who are not taking advantage of multi-policy discounts or who are not getting your premium service across all lines of business are being underserved.

Key insights:

- ✓ Geographical Dispersion
- ✓ Client Spotlight
- ✓ Cross-selling views



“Being able to quickly grab all Commercial Lines clients who didn't have Cyber insurance made it so easy to jump start what ended up being a very successful cross selling campaign for our agency that **not only improved revenue**, but also retention that comes with more lines inforce.”



James Harness

Chief Sales Officer,
Insurance Management Group

The background is a solid blue color with several overlapping, wavy, light blue shapes that create a sense of depth and movement. These shapes are positioned in the upper half of the frame, resembling stylized waves or hills.

PORTAL ONE
Data Security



Security

Above all else we want you to know we take your data security very seriously. We use Microsoft Azure and Power BI because they are the industry leader in data security.

You own your data, and we will take great care of it. We will never sell or share it.





**Our core team
brings together a
unique combination
of insurance and
technology know-
how and experience.**



Todd Dailey
Chief Executive Officer

Responsible for overall architecture. Data and operational expert with over 10 years' experience in business intelligence in the insurance industry, including a leading US P&C carrier.



Trent Dailey
Chief Strategy Officer

Consulting and strategy for dashboards and interactive analytics. Sales producer and Agency Owner responsible for overseeing double digit growth over the last 5 years.



Jordan Draper
Director of Business Development

Agency leadership developer with 12 years of insurance experience in operations and sales. Looks for new ways to solve problems through tech stack integration and product development.



Josh Millspaugh
Business Development Specialist

MBA with over 20 years' experience in business administration, operations, management, and marketing with a focus on client experience and exceptional customer service.



After doubling our agency in less than 5 years with Portal One as the centerpiece, we're impassioned to help other independent insurance agencies do the same, one insight at a time.



Thank You!

Todd Dailey

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