

Underwriting

Commercial Lines Underwriting Trainer

Client Type:

Property and Casualty Carrier

Project Scope:

Standardizing Practices

Duration:

7 Months

Team Size:

1 Full-Time Consultant

Problem

This property and casualty carrier was experiencing inconsistent underwriting decisions. The underwriting team **lacked formal, standardized guidelines and processes resulting in discrepancies in underwriting procedures.**

Response

Jacobson provided an experienced commercial lines underwriting trainer to step in and evaluate the client's underwriting practices. The consultant interviewed the underwriters to determine their individual processes. With consideration to current individual processes, **the consultant determined a proper training process and standardized processes and procedures to align with corporate objectives.** The trainer then revised the training manual and re-trained the underwriting staff.

Solution

Jacobson's consultant **played a key role in standardizing the client's underwriting practices.** The department now operates under formal, standardized processes, including revised forms. The consultant also provided a revised formal training manual to maintain formal procedures into the future.

