



# Xceedance On-Demand Broker Support Services

Empowering Brokers. Elevating Capacity. Enhancing Client Service.



Insurance brokers are responsible for a wide range of essential administrative tasks throughout the policy lifecycle. While critical, these activities often consume a significant portion of operational capacity—especially during peak renewal periods—leaving less time for relationship building, revenue generation, and strategic growth.

Xceedance provides a powerful solution.

Our **on-demand support services** enable brokers to streamline administrative workflows, eliminate backlogs, and shift focus to high value activities that drive business expansion. Whether used year round or deployed during busy seasonal cycles, our services deliver scalable expertise exactly when it's needed.

## Why Brokers Choose Xceedance



### Technology Enabled Efficiency

Our domain experts leverage intelligent processes and modern tools to support administrative tasks such as claims notifications, policy checking, quote processing, documentation management, and CRM updates. This combination ensures high accuracy, reduced E&O exposure, and seamless communication with policyholders and carriers.



### Industry Expertise at Scale

Xceedance teams include seasoned insurance professionals, licensed agents, and technology specialists who integrate directly with your workflows. We help optimize each stage of your operations, improving speed, accuracy, and client satisfaction.



### Flexible, On-Demand Capacity

With short activation timelines and agile pricing models, brokers can scale operational support up or down based on-demand. You get precisely the service you need—exactly when you need it—without long term commitments.



### Global Right Shore Delivery

Our delivery centers in the U.S., Poland, and India ensure 24/7 operational continuity. The right shore model enables cost efficiency without compromising quality or turnaround times.



# Comprehensive On-Demand Services



## Documentation Support

Professional, compliant documentation at speed.

- Policy issuance
- Policy checking aligned to client requirements
- Policy wording comparison
- Downloading and issuing insurer documentation
- Quote presentation verification



## Coverage & Endorsement Management

Seamless handling of mid term adjustments and policy changes.

- Processing of cover level changes
- Policy amendments (e.g., buildings, vehicles, etc.)
- Driver or insured party updates
- CRM/AMS updates to maintain accurate records
- Full endorsement lifecycle support



## Quote Processing

Fast, accurate quote management to enhance client responsiveness.

- E-trade quote processing on insurer portals
- Issuance of quotes to brokers or clients
- Updates to AMS/CRM systems
- Complete end-to-end quote handling



## Accounting Support

Reliable financial administration to keep your accounts accurate.

- Insurer account reconciliation
- Carrier statement and payment matching
- Invoice and payment chasing
- Book of business performance analysis



## Claims Support

End-to-end assistance to manage claims efficiently and empathetically.

- Claim registration on insurer portals
- Claim form validation to reduce incomplete submissions
- Client updates, acknowledgments, and status communication
- Full FNOL (First Notification of Loss) support



## Client Management

Ensuring your CRM stays accurate, current, and actionable.

- Contact, policy, and activity logging
- CRM housekeeping, reminders, follow ups, and reporting
- Database clean up to ensure data integrity

## The Xceedance Edge



### On-Demand, On Time

High quality service with agile pricing and rapid activation timelines.



### Right Shore Optimization

A global delivery model designed for cost efficiency, scalability, and continuous support.



### Strategic Operational Partnership

We provide more than manpower—we deliver expertise in process optimization, digital transformation, and operational excellence across the entire insurance lifecycle.

## Your Growth. Our Commitment.

At Xceedance, we partner with brokers to create seamless operational ecosystems that enhance efficiency, capacity, and client service excellence. With our on-demand model, you retain full control while gaining access to a trusted operational powerhouse ready to support your goals

## Speak with one of our experts:



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