



Xceedance Bordereaux Management Platform

A smarter, faster way to manage bordereaux data



Transforming Insurance Data Management

50%

Improvement in
Processing new Bordereaux

60%

Faster Processing
for Repeated Vintage

80%

Accuracy increase in
Data mapping & Standardization



One stop solution for both
Aggregate and DUA Bordereaux

The Bordereaux Management Challenge

In today's insurance landscape, bordereaux remain a critical but complex mechanism for reporting written/paid premiums, claims, and risk exposures from brokers, coverholders, and MGAs. Effective bordereaux management is crucial for insurers and reinsurers to maintain portfolio visibility, fulfill regulatory obligations, and inform underwriting and pricing decisions.

However, the reality of bordereaux processing is often operationally demanding:



Manual data handling is required to resolve duplicates, missing values, and complex mappings.



The **transactional nature** of bordereaux makes it difficult to maintain an accurate in-force position.



Ongoing **monthly vintages** must be reconciled with historical data.



Tracking outstanding submissions and managing **TATs** and **SLAs** adds further operational overhead.



Data is received from **multiple sources and formats**, often containing non-standard or inconsistent information.

These challenges can result in delayed processing, reduced data usability, and increased operational risk.

Delegated Underwriting Authority (DUA) teams operate in highly fragmented bordereaux environments, where data quality, visibility, and standardization directly impact underwriting, exposure management, and compliance.

Common challenges include:



Manual consolidation of data across multiple files and tabs, leading to inefficiencies and inconsistencies



Limited clarity on overdue or missing bordereaux, impacting SLA adherence and reporting timelines



Inconsistent formats and mapping requirements across MGAs and coverholders



Gaps in address cleansing and geocoding, affecting downstream modeling and analytics



Poor usability of data for exposure management, due to lack of standardized and enriched data



Limited flexibility in data exports, restricting advanced analytics and reporting use cases



Limited visibility into data completeness and status, making it difficult to track progress across bordereaux submissions

Across platforms, these challenges often result in manual intervention, delayed processing, and reduced confidence in data quality.

Where Existing Platforms Fall Short

While several platforms support bordereaux processing, gaps remain in delivering a complete, integrated, and scalable solution:



Limited UI-based visibility into data completeness and progress



Inability to seamlessly merge data from multiple sources



Lack of end-to-end exposure-ready data preparation



Constraints in custom output generation and flexible analytics



Inconsistent data standardization and validation depth

These gaps create reliance on manual workarounds, external tools, and fragmented workflows.

Our Solution: End-to-End Bordereaux Management, Reimagined

The Xceedance Bordereaux Management Platform provides a centralized, automated solution designed to simplify and standardize bordereaux processing across risk, premium, and claims data.

Purpose-built for scale, accuracy, and repeatability, the platform enables insurers to move from manual, fragmented processes to a controlled and transparent operating model.



Platform Capabilities



Request Workflow and Dashboards

- Project-level and Unique Market Reference (UMR)-level dashboards delivering real-time visibility into progress, complexity, TAT, accuracy, and renewal status
- Request Management Module for raising Bordereaux requests and setting up Coverholders
- Support for multiple sections under a single contract
- SLA driven tracking configurations for monitoring and managing Bordereaux data chasing for outstanding vintages
- Integrated UI views to track outstanding data, send chasers, and monitor queue status
- Dashboards highlighting Estimated Premium Income (EPI) performance, Coverholder timeliness, and processing status



Processing & Transformation

- Import and merge Bordereaux files for monthly processing
- First time mapping using the platform's machine learning (ML)-powered mapping capability
- Reuse of stored mappings and transformation logic for updated vintages
- Automated data standardization through a centralized repository
- Early validation checks to identify invalid or incomplete data
- Cutoff prediction and application for accurate policy segmentation
- Automatically merges data from multiple files and tabs into a single unified dataset, eliminating manual consolidation
- Cleanses and standardizes address data with parsing and geocoding capabilities, improving readiness for exposure management and loss modeling



Reporting & Output

- Operational reporting including average handling time (AHT), SLA adherence, and error logs
- Bordereaux analytics for executive summaries and month-over-month comparisons
- Output generation in multiple pre-configured and custom formats
- Export monitor to track file status, timestamps, and completion
- Model-ready outputs including OED, AIR, Lloyd's v5.2, and client-specific formats
- Enables flexible exports and aggregation, including the ability to combine risk, premium, and claims data for advanced analytical use cases



Transaction & Validation

- Rule-based transaction prediction and handling with full lifecycle checks
- Pre and post sanity checks with real-time visibility into Lloyd's mandatory fields
- Undo functionality for expired and future-dated policies and transactions
- Configurable rule engine supporting both processing and financial validation



Proven Outcomes

The Xceedance Bordereaux Management Platform consistently delivers tangible outcomes in complex bordereaux environments where data volumes, formats, and reporting requirements vary significantly.

By centralizing data, automating validation and processing, and enabling reusable mappings and rule-based workflows, organizations achieve:



50% improvement in processing new bordereaux through repository build



60% faster processing for repeat monthly bordereaux, driven by reusable mappings and standardized workflows



80% increase in data accuracy, supported by early validation, transaction handling, and sanity checks

All bordereaux data is consolidated into a single source of truth, enabling faster analysis, easier reconciliation, and the generation of custom reports without the need for repeated rework. The platform adapts seamlessly to different reporting and model requirements, supporting confident decision-making across underwriting, operations, and compliance teams.

The platform continues to evolve with enhancements focused on automated data chasing and simplified data ingestion workflows, further reducing manual effort and improving data timeliness.

Partnering for the Future of Insurance Data

The Xceedance Bordereaux Management Platform transforms bordereaux management from an operational burden into a strategic advantage. With proven outcomes, a robust current feature set, and deep domain expertise, Xceedance helps insurers and reinsurers simplify complexity, improve data confidence, and operate at scale.

To learn how Xceedance can help you reimagine bordereaux management and improve efficiency, accuracy, and control, get in touch with our team.



Scan the QR code to visit our website,
or go to www.xceedance.com

