



# 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.

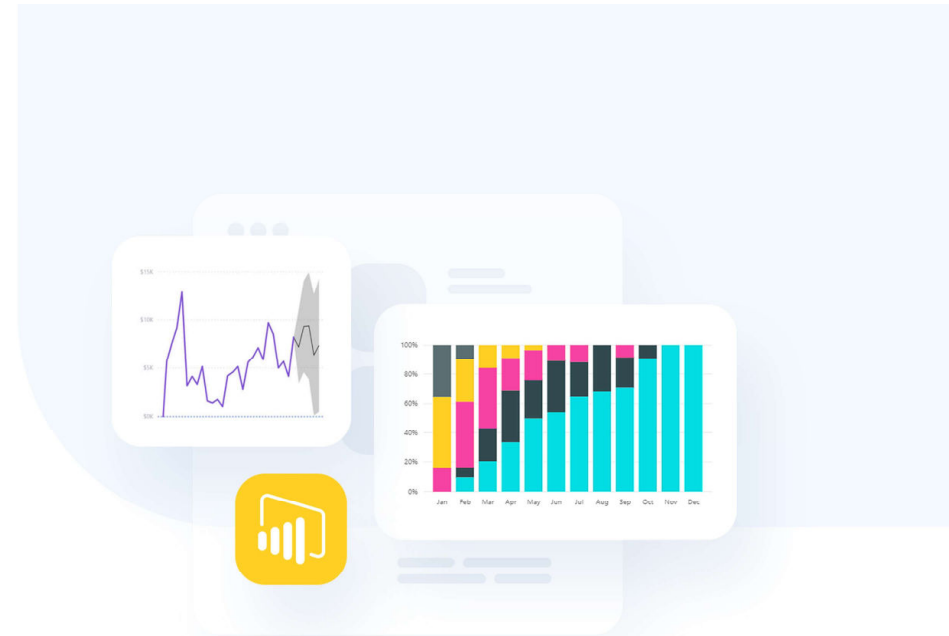


THE SOLUTION

# 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.



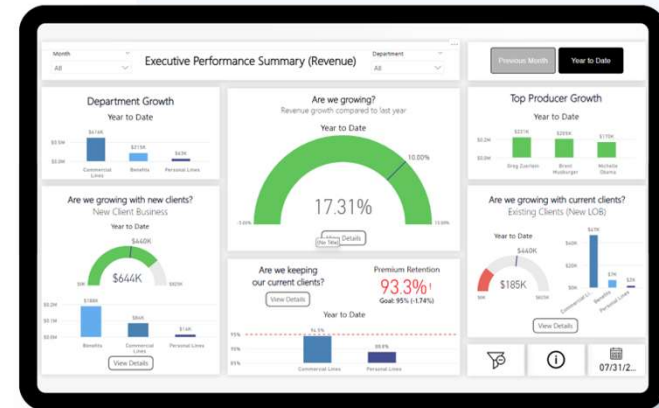
# Agency Performance

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





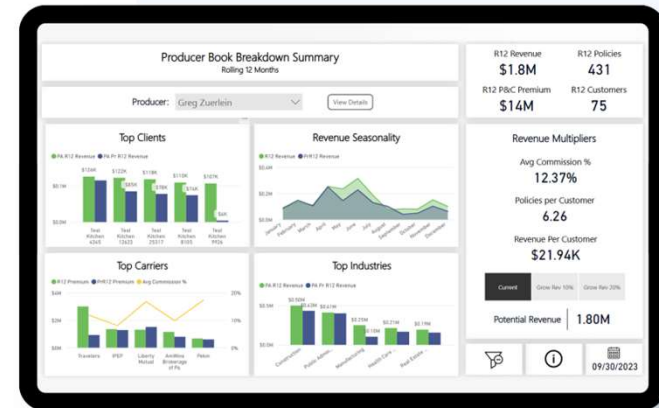
# Team Development

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

The screenshot displays a 'Carrier Analysis' dashboard with two tables. The left table lists carriers such as Alico, Alico Commercial, and Alico Personal, showing their YTD Premium and YTD Loss Ratio. The right table lists carriers like CNA Insurance, CNA Commercial, and CNA Personal, also showing their YTD Premium and YTD Loss Ratio. The dashboard includes search filters and a date range selector set to 07/31/2023.

“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



# Data Quality

## What gets monitored gets managed.

The unsung hero of Portal One. We've all heard the old adage 'garbage in, garbage out', but you can't start removing potential garbage until you know what you have. Our data quality dashboards allow agencies to highlight certain data sets or scenarios that are more subject to quality issues within the agency, so that they can identify, clean-up and sustain high quality data.

### Key insights:

- ✔ Policies inforce for more than 120 days with no recognized revenue
- ✔ Policies still assigned to inactive employees
- ✔ Clients with active premium that are still showing as prospects
- ✔ Policies with missing data attributes

Customer Number	Policy Number	Policy Status	Policy Expiration Date	Premium
28019	02170244623	Active	9/16/2023 12:00:00 AM	1,820.00
28833	00219097228	Active	9/16/2023 12:00:00 AM	4,471.00
48421	417025	Active	9/16/2023 12:00:00 AM	30.00
39994	418466770	Active	9/16/2023 12:00:00 AM	4,918.16
39904	418466774	Active	9/16/2023 12:00:00 AM	3,390.32
39964	418466770	Active	9/16/2023 12:00:00 AM	2,239.94
12524	403133128	Active	9/16/2023 12:00:00 AM	2,389.24
12527	403447792	Active	9/16/2023 12:00:00 AM	2,148.80
92138	581748800	Active	9/16/2023 12:00:00 AM	4,831.84
48441	511774760	Active	9/16/2023 12:00:00 AM	3,213.84
48441	511774760	Active	9/16/2023 12:00:00 AM	3,213.84
28833	521127401	Active	9/16/2023 12:00:00 AM	779.00
28833	521127401	Active	9/16/2023 12:00:00 AM	829.38
39607	61207747601	Active	9/16/2023 12:00:00 AM	2,846.00
52624	6491674	Active	9/16/2023 12:00:00 AM	191,740.00
39773	717618170	Active	9/16/2023 12:00:00 AM	9,764.00
39773	718115148	Active	9/16/2023 12:00:00 AM	12,764.00
22170	801703176	Active	9/16/2023 12:00:00 AM	360.00
12521	8447723461	Active	9/16/2023 12:00:00 AM	2,444.00
34117	92328422	Active	9/16/2023 12:00:00 AM	4,824.00
12521	940482539	Active	9/16/2023 12:00:00 AM	624.00
51733	99027604	Active	9/16/2023 12:00:00 AM	503.00
12524	99027601	Active	9/16/2023 12:00:00 AM	1,123.00
42448	994882516	Active	9/16/2023 12:00:00 AM	364.00
48217	991101103	Active	9/16/2023 12:00:00 AM	4,168.00
54524	991101103	Active	9/16/2023 12:00:00 AM	484,412.00
55102	CA1004716	Active	9/16/2023 12:00:00 AM	1,894.00
55102	CP1000124	Active	9/16/2023 12:00:00 AM	701,144.00
28833	CP1000124	Active	9/16/2023 12:00:00 AM	32,824.00
12521	264827181	Active	9/16/2023 12:00:00 AM	111,240.00
92624	2726288100	Active	9/16/2023 12:00:00 AM	58,510.00
Total				\$1,181,408.87

"We previously struggled to understand if we were being paid by carriers on all of our accounts. Premium Logic setup a custom scenario to show us any account that had been effective for more than 90 days, that we had received no revenue on. We identified over 20,000 of policies that we were able to follow up on and quickly get remediated."



**Jordan Draper**  
 Director of Operations,  
 Dagley Insurance Agency, LLC

The background is a solid blue color with several white, wavy, horizontal lines that create a sense of motion or a stylized landscape. The lines are layered, with some appearing more prominent than others.

**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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