



ACTUARIAL AND ANALYTICS

Client Maintains Continuity when Faced with Loss of Key Employee



The Client

The client is a managing general agent (MGA) and technology-powered broker platform providing access to tailored insurance products for small businesses.

The Challenge

The client faced the loss of a key employee, leaving the organization with no immediate successor. This was an actuarial position, and the client knew it would take time to recruit and on-board an appropriately skilled replacement. In the interim, critical information would be unavailable without outside assistance to analyze their reserves.

Our Solution

The Xceedance solution consisted of the following:

Reserving Analysis

- ▶ Provide skilled, credentialed actuaries to complete the analysis
- ▶ Review data for anomalies and consider various adjustments as appropriate
- ▶ Provide a range of reasonable ultimate projection estimates and selected point estimate

Transition Support

- ▶ Partner with the client to ensure the work could be transitioned back to the new internal resource
- ▶ Provide documentation and processes to support the transition

Stakeholder Presentations

- ▶ Communicate selections and findings with company leaders and partners
- ▶ Provide results with clearly documented exhibits

Proven Results

Xceedance provided expert analyses, including industry benchmarking to validate results. The client knew that business decisions could suffer in the face of missing or erroneous analyses. By utilizing the Xceedance team to fill staffing gaps, the client maintained its competitive advantage and ensured a smooth transition back to their internal resources at the right time.

Voice of the Customer

"We experienced a time when we were short-staffed but were faced with making critical strategic decisions about our business. The Xceedance team was able to step in and provide the resources to give us the insight we needed to move the business forward. They were able to act quickly, provide high quality work at an affordable price. They also provided additional support as we restaffed to ensure a smooth transition. Thank you to the Xceedance team!"

– Chief Underwriting Officer



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