CRMWG Benchmarking Survey

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Q1 Thank you for taking the time to complete The Council's Claims and Risk Management Benchmarking Survey. Your participation is greatly appreciated in this effort to generate useful benchmarking data for Council members.

All data will be de-identified and aggregated. Each firm has a personalized link to this survey, meaning answers will be saved as you go—you can always leave the page and come back to finish responses.

This survey will not ask any specific revenue-based questions from your firm. Again, all data used in the final report will be completely anonymous.

The deadline to complete the survey is August 31, and completion of this survey to the best of your ability is required for access to the final report. The report and data analysis will be released at The Council's fall Claims & Risk Management Working Group, September 18-19, 2019 in Washington, DC. Please contact Robert.Boyce@ciab.com for any questions.

Again, thank you for your time and for your valuable input.

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Q2 Please provide your contact information:

- ○ Name: (1) _____
- ○ Title: (2) _____
- ○ Company: (3) _____
- ○ City: (4) _____
- ○ State: (5) _____
- ○ Telephone number: (6) _____
- ○ E-mail: (7) _____

Q3 Roughly what percentage of your revenue comes from the following lines?

	0 10 20 30 40 50 60 70 80 90 100
P/C ()	
EB ()	
Personal Lines ()	
Other (e.g. TPAs, consulting): ()	

Q4 Please specify:

_____

Q5 Please list the technology solution providers used by your firm:

- ☐ Agency Management System (ex. Applied/Vertafore) (1) _____
- ☐ Risk Management Information System (ex. Origami, Riskonnect) (2) _____
- ☐ Claims (ex. eClaims) (3) _____
- ☐ CERT tracking (ex. Ebix, MyCOI) (4) _____
- ☐ Other (please specify) (5) _____

Q6 By account size revenue, what is your company's minimum threshold to provide **proactive** risk services (risk control, safety, claims)?

- ○ We provide these services to all-sized accounts. (1)
- ○ <$25,000 (2)
- ○ $25,000-50,000 (3)
- ○ >$50,000 (4)

Q7 Total number of your employees in commercial P/C:

_____

Q8 Total number of commercial P/C producers:

_____

Q9 Total number of commercial P/C support staff (excluding claims/risk management personnel):

_____

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Q10 Number of in-house claims personnel by LOB:
Workers' Comp: : _____ (1)
Property/Casualty: : _____ (2)
Number of claims support staff for claims reporting only: : _____ (3)
Other (please specify in next question): : _____ (4)
Total : _____

Q11 Does your firm have other specialized claims personnel? Please indicate their primary discipline and provide a short description of their primary responsibilities:

- ☐ Business Interruption (1) _____
- ☐ Cyber (2) _____
- ☐ Data analytics (3) _____
- ☐ Other (please specify) (4) _____

Q12 Does your agency report any claims on behalf of your clients?

- ○ Yes (1)
- ○ No (2)

Q13 If so, for which lines of business? (Check all that apply.)

- ☐ Worker's compensation (1)
- ☐ Commercial auto (2)
- ☐ General liability (3)
- ☐ Professional liability (4)
- ☐ Commercial property (5)
- ☐ Other (please specify): (6)

Q14 Roughly what percentage of **commercial** property/casualty claims are reported by the following teams?

	0 10 20 30 40 50 60 70 80 90 100
Account service team ()	
Claims team ()	

Q64 On average, how many claims are reported by your clients during a typical quarter?

Under $1 million claims: (1)	▼ None (1) ... I don't know (9)
Over $1 million claims: (2)	▼ None (1) ... I don't know (9)

Q16 Does your firm partner with any TPAs for claims assistance?

- ○ Yes (1)
- ○ No, but might in future (2)
- ○ No (3)

Q59 Do you own a TPA or partner with a TPA?

- ○ Own a TPA (please specify) (1) _____
- ○ Partner with a TPA (please specify) (2) _____

Q18 What is the estimated average years of experience for your claims personnel?

_____

Q19 What's your estimated annual claims personnel budget including salary, contract labor, and overtime?

Note: Do not include bonuses or benefits.

_____

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Q20 Number of in-house risk control consultants:

_____

Q21 Comments:

_____

Q22 Does your firm partner with any third party providers of risk management services?

- ○ Yes (1)
- ○ No, but may in future (2)
- ○ No (3)

Q61 Please specify:

_____

Q23 Number of risk management specialists (risk control, loss prevention, safety) by industry:

Note: Specialists may work across multiple industries.
Healthcare/Social Services: : _____ (1)
Construction: : _____ (2)
Manufacturing: : _____ (3)
Transportation: : _____ (4)
Energy: : _____ (5)
Education: : _____ (6)
Food/Agriculture: : _____ (7)
Other (please specify): : _____ (8)
Total : _____

Q24 Comments:

_____

Q25 Does your firm have other specialized risk management personnel? Please indicate their primary discipline and provide a short description of their primary responsibilities:

- ☐ Absence management (1) _____
- ☐ Continuity planners (2) _____
- ☐ Security consultants (3) _____
- ☐ Other (please specify): (4) _____

Q26 Comments:

_____

Q27 Does your firm's commercial property/casualty division have a dedicated analytics/actuarial team?

- ○ Yes (1)
- ○ No (2)

Q28 How many are on the team? Is it integrated into your risk services?

_____

Q29 What is the estimated average years of experience for your risk control personnel (e.g. loss control, safety, risk control)?

_____

Q30 Does your agency charge back producers for providing in-house risk management services, absorb the investment to the house expenses or charge clients a fee?

- ○ Charge back to producers (1)
- ○ House expenses (2)
- ○ Fee for service (3)
- ○ Other (4)

Q31 Please explain:

_____

Q32 What's your estimated annual risk management (risk control, safety, loss control) personnel budget including salary, contract labor, and overtime?

Note: Do not include bonuses or benefits.

_____

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Q33 Are your claims and risk management teams integrated?

- ○ Yes (1)
- ○ No (2)
- ○ No, but we plan to integrate them (3)
- ○ No, but we are in the process of integrating them (4)

Q34 Please explain (integration process, pertinent anecdotes, etc.):

_____

Q35 What benchmarks does your firm use to determine whether or not there is a need for increased staffing levels?

_____

_____

_____

_____

_____

Q62 Does your firm have any current key initiatives within your claims or risk management teams?

- ☐ Claims team (1)
- ☐ Risk management team (2)

Q63 Please explain:

_____

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