

insurity

Case Study: Transforming Premium Audits - How Amerisure Streamlined Operations & Elevated Service

The Challenge:

A Legacy Model in a World that's Gone Digital

For years, premium audits at Amerisure relied heavily on traditional methods, including in-person visits, mailed forms, and follow-up calls. While this approach had been reliable, it no longer met the expectations of policyholders or agency partners operating in an increasingly digital-first environment. The audit process was often slowed by manual work, fragmented communications, and inefficient data collection.

Amerisure recognized an urgent need to modernize.

The goal? Deliver a seamless, connected experience that eliminated friction, improved turnaround times, and reflected the company's commitment to innovation.



- **Focus:** Commercial P&C insurance for construction, manufacturing, and healthcare businesses
- **Reach:** Licensed in all 50 states with a trusted agent network
- **Reputation:** Award-winning service, innovation, and named among the best places to work in the industry



"Our Premium Audit team exemplifies innovation by combining cutting-edge technology with a customer-first approach. Through our strong partnership with Insurity and a commitment to continuous improvement, we deliver a seamless and efficient audit experience that meets the evolving needs of our policyholders."

JOHN COFFARO

AVP OF PREMIUM AUDIT, AMERISURE

The Solution:

A Smarter, Fully Integrated Audit Experience

After a thorough evaluation of multiple vendors, Amerisure chose to expand its existing relationship with Insurity by adopting its Premium Audit software. The implementation included two powerful tools: AutoAudrey, a centralized audit portal, and Payroll Validator, designed to streamline payroll data capture.

Implementation and Rollout

Amerisure began with a focused rollout, working closely with Insurity to tailor the solution to its unique needs. The partnership was hands-on and collaborative, with Insurity's team incorporating feedback, customizing features, and ensuring a smooth transition across teams.

The Results:

Faster, Easier, More Efficient Audits

The shift to Insurity Premium Audit has been transformative for Amerisure, driving measurable improvements in efficiency, accuracy, and policyholder experience:

50% reduction in touchpoints for requesting audit records, with many policyholders uploading documents proactively

2,200+ hours saved annually as automated communications streamline scheduling and reduce administrative overhead

50% of audits completed virtually, compared to 95% in person pre-pandemic, reflecting a more flexible audit model

15 minutes saved per audit as interactive Dynamic Data Collector (DDC) forms automatically match to the correct risk types, eliminating manual selection

500+ hours recovered annually by reducing follow-up questions and record requests, thanks to centralized access via AutoAudrey



The result? Amerisure has brought its long-term vision to life, transforming audits into a streamlined, technology-driven experience that delivers greater value to both auditors and policyholders.

What's Next:

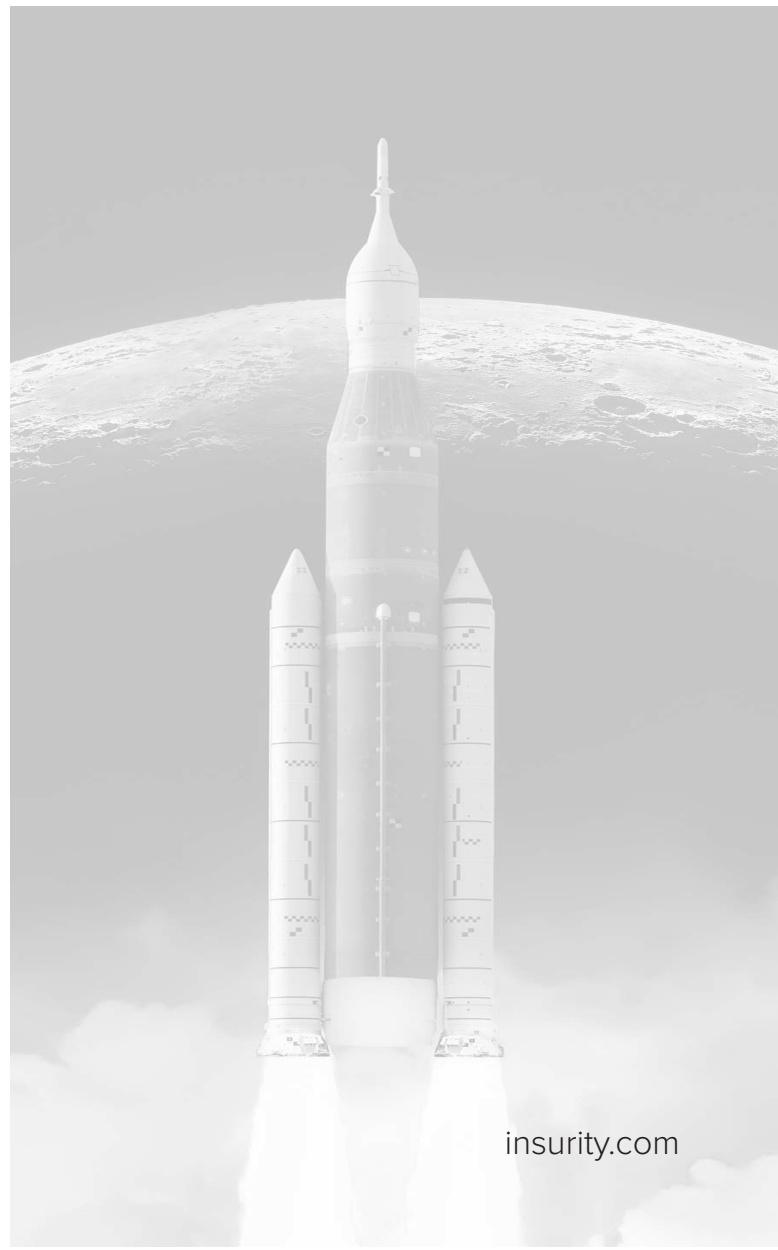
Building on a Foundation of Innovation

Amerisure is already expanding its use of Insurity Premium Audit. New features like policyholder self-scheduling, enhanced email distribution, and future capabilities such as chatbot support and Microsoft Teams meeting integration are in the works.

Amerisure's journey is evidence of what's possible when long-term vision meets the right technology partner. By continuing to invest in smarter, more flexible solutions from Insurity, Amerisure remains well-positioned for growth and able to deliver on its commitment to provide exceptional service and lead the way into the future of premium audits.

About Insurity

Insurity is a leading provider of cloud-based software and analytics for insurance carriers, brokers, and MGAs. Insurity is trusted by 22 of the top 25 P&C carriers and 7 of the top 10 MGAs in the US and has over 400 cloud-based deployments.



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