

OPERATIONAL EFFICIENCY REVIEWS (E&O AUDITS)

To help IIAV members remain competitive, well organized, and profitable, IIAV and The Moberg Group, offer the Agency E&O Review Program.

E&O RISK MANAGEMENT — WEBSITE REVIEW

SwissRe/Westport's January 1, 2020 change to allow a 5% premium credit for website reviews is a wonderful opportunity for your agency to take advantage of the savings.

If your agency is already receiving a current 2020 Risk Management premium credit you are now eligible to receive an additional 5% credit if you have a website review completed. The 5% Web Site audit credit is in addition to your 10% E&O Audit Credit if you have a current E&O Audit credit.

If your agency is interested in completing a website review please contact us, the cost is **\$750.00**.

OPERATIONAL EFFICIENCY REVIEW (E&O AUDITS)

TMG has performed almost 2,000 Operational Efficiency Reviews (E&O Audits) over the past 27 years and we would love the opportunity to work with you to provide both an E&O audit and website review.

As of January 1, 2020, all new Operational Efficiency Reviews (E&O Audits) are required to include an agency website review for a potential audit credit of 15%. Combined with a current 2020 10% Risk Management credit your agency could earn a total of 25% in premium savings.

"We are very happy with the services provided by The Moberg Group, who we employed to perform our agency audit. Mr. Moberg managed to do a comprehensive review of our agency while making efficient use of our time in doing so. His audit report gave us a clear list of action items with timelines for each, and he also provided a procedures manual and an array of useful forms."

Linda Smith, CPCU
Morgan Marrow Company



OPERATIONAL EFFICIENCY REVIEW AGENDA

Initial on-site review

- Examines all areas
- Focuses on people and processes
- Develops an Action Plan tailored for your agency
- Establishes a time table

Ongoing assistance

- Help with procedures, tools and advice

Follow-up review (6 months)

- Focus plan and timetables
- Review and adjust original plan

ABOUT THE MOBERG GROUP

Since 1993 The Moberg Group (TMG) has performed E&O Risk Management Audits, Agency Operations, Sales and Management Training and Automation Seminars on an international level. TMG has consulted with many of the top national and regional insurance companies, several thousand independent agencies and brokers to provide a selection of services to meet operational requirements:

- E&O Risk Management
- Business Planning
- Mergers and Acquisition
- Agency Valuations
- Perpetuation Planning
- Workflow Implementation