



Good Data

It all starts here. Collect all the various elements of information you will need to properly manage the certificate of insurance compliance process: accurate information for all insureds and certificate holders are key.

Requirements

Adjust your requirements according to the degree of perceived risk you may be exposed to on a case-by-case basis, and don't overreach by asking for more insurance coverage than is required in the contract.

Enforcement

What gets talked about gets paid attention to. Routinely engage with all appropriate insureds, their brokers and internal staff to ensure the rules are followed consistently by all parties to the process.

Analysis

If you don't measure the results you'll never know how you are doing. Create useful reports and data visualizations that allow managers to quickly see where opportunities for improvement exist.

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