

Vision™ Platform Broker FAQs

What is the Vision™ platform and what does it give me and my business?

Broker Insights Vision™ is a software platform that provides you with quick and easy insights into your business and workflow tools to support your placement strategy, highlight opportunities and help insurer engagement. It is simple for you to upload data and use the tools for the benefit of your business.

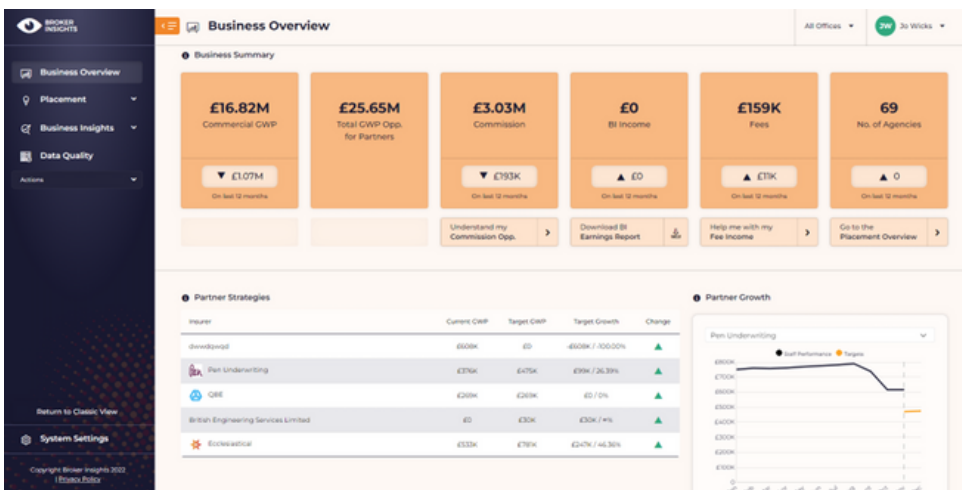
How do I access Vision™ ?

You will receive a unique login to the Vision™ platform, which you can safely and securely access. You can also get logins for any individuals in your brokerage who you would like to have access. Initially, you will receive a Microsoft TEAMS invite from Broker Insights on Cobra Network's behalf to a report set-up call. A Cobra Network representative will also be on the call. We will take you through step by step, live on the call how to create the report on your system and how to upload your data into the Vision™ platform. Once the data is uploaded, you will then be able to view it through your unique login and on your own dashboard.

How does the Vision™ platform work?

You will run the report from your back-office system on a monthly basis to keep everything relevant and up to date. You'll use the Vision™ platform to upload your data (via a secure upload option) and then view your data via a series of dashboards bespoke to you, showing you:

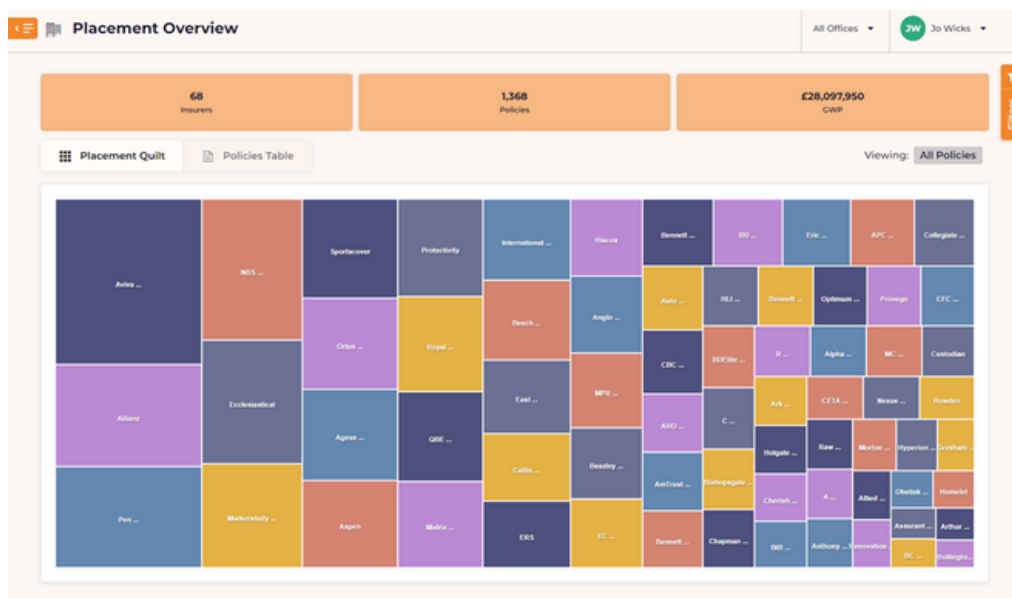
- Overall GWP
- Which markets currently hold your business
- What you earn from these markets



Vision™ Platform Broker FAQs - Continued

The Vision™ Platform has various options and functionality allowing you to:

- See your agency database quickly and easily, plus which products are supported most with which markets.
- See your earnings from these products and markets, allowing you to understand where your income is derived and make decisions on areas that might need to be tweaked.
- Set a placement strategy and input growth targets with your chosen insurers and have a clear plan in place for your team.
- Monitor these targets monthly allowing you to drive your business the way you want it to go.
- See the main appetites for each of your panel insurers and Vision™ can overlay your renewal data with those appetites, allowing you to make placement choices and maximise opportunities with these insurers.
- Identify agency consolidation opportunities thus potentially improving earnings.
- And more.....! It really is a fantastic Management Information tool for you to use.



The screenshot shows the 'Policies Table' view of the 'Placement Overview' dashboard. It displays a list of policies with columns for Customer, Handler, Policy Number, Insurer, Product, Product Class, Renewal Date, Premium, and In App. The table is filtered to show 25 policies per page.

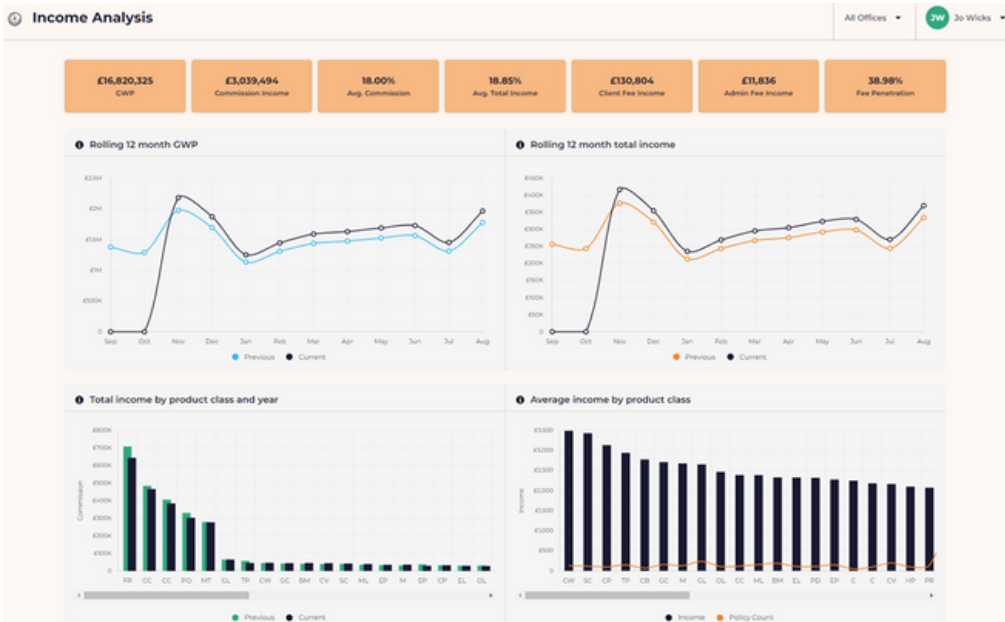
Customer	Handler	Policy Number	Insurer	Product	Product Class	Renewal Date	Premium	In App
Gerald Knevelud	OK	ACT1-57N793408	Auto Legal Protection Services Ltd	Financial	Combined Business Travel/PI/Business	18/03/2024	£73,500	OK
Sean Alatachach	OK	ACT1-627162071	East Kent Underwriting	Commercial Motor	Fleet Based Commercial Motor	24/06/2024	£73,500	OK
Bethana Truster	OK	ACT1-763705002	ROEWE Ltd	Commercial Motor	Fleet Based Commercial Motor	16/06/2024	£73,500	OK
Cloux Haylor	OK	ACT1-623079440	Excelsior	Commercial Motor	Motor Trade	19/10/2023	£73,500	OK
Karyl Soane	OK	ACT1-168300382	Morton Michal Insurance Services	Commercial Motor	Fleet Based Commercial Motor	10/03/2024	£73,500	OK
Horgan Toombs	OK	ACT1-220264760	HCL UK Ltd	Property	Property Owners	01/03/2024	£73,500	OK
Ag McCartan	OK	ACT1-925766997	Aspen	Commercial Motor	Fleet Based Commercial Motor	30/09/2023	£73,500	OK
Grosser Channing	OK	ACT1-286023248	Bennett Christmas Insurance Brokers Ltd	Commercial Motor	Fleet Based Commercial Motor	05/03/2024	£73,500	OK
Marlette Neman	OK	ACT1-622638935	Royal & Sun Alliance Insurance Plc	Property	Contractors Combined	30/03/2024	£73,500	OK
Kimberlyn Glascock	OK	ACT1-186236049	Pen Underwriting	Other Commercial Single Class	Single Class (Commercial)	18/06/2024	£73,500	OK
Anna maria Park	OK	ACT1-882433086	Aviva Insurance Ltd	Property	Property Damage	09/10/2023	£73,500	OK



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Vision™ Platform Broker FAQs - Continued



Is the Vision™ platform secure?

Yes, Broker Insights use SSL encryption to ensure all communication between customer and server is protected end-to-end.

And how is my data protected?

Your data is in safe hands. Broker Insights is an ICO-registered and approved organisation, meeting the requirements of ISO 27001 – the globally recognised highest standard for information and security management systems. Broker Insights' products have been designed and built with security and privacy at their core.

I can see that it allows me to drill down to client level – can Cobra Network see those client details?

Cobra Network will only see anonymised views of data to work with insurer partners and drive better outcomes for members – they will not see the names of your clients.

I would like more help to make the best of the Vision™ platform – who will help me?

If you feel you need help, Cobra Network have arranged webinars with Broker Insights so that you can join and ask any questions that you may have. You can also contact your Strategic Account Manager who can give you some support in the use of the system – if they don't know the answers, then they can arrange a call with Broker Insights for you to get the help you need. We will support you every step of the way.



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