

Analytics in Cora Underwriting Manager

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Overview

Analytics in Cora Underwriting Manager comes with the following prebuilt dashboards in Microsoft Power BI.

- Avg submission handling time
- Touchless operations
- Underwriter Portfolio
- Accounts Performance

With Microsoft Power BI pro license you can create self-service analytics using the semantic model.

Cora Underwriting Manager includes some preconfigured reports and dashboards, while you can also create customized reports and analytics with the reporting database. With the reporting database you can also connect different analytic tools per your requirement.

List of available dashboards and reports in Cora Underwriting Manager

Dashboard UWM Submissions Intake Status

Name	Type	Description
Number of open exceptions by exception type	Pie	Pie chart that shows the distribution of current open exceptions.
Current open exceptions by UWA	Vertical Bar	Bar chart that shows the distribution of current open exceptions by UW Ops.
Number of Submissions by Underwriter	Vertical Bar	Bar chart that shows the distribution of submissions by Underwriter within the selected date range.
Number of Submissions by Line of Business	Horizontal Bar	Bar chart that shows the distribution of submissions between the different lines of business within the selected date range.

Reports

Name	Type	Description
Submissions Data	Grid	View details of all the submissions that have been created within the selected date range.

List of available dashboards and reports in the Microsoft Power BI

Submission intake Avg handling time

Name	Type	Description
Avg handling time for all submissions	Number	The average handling time for all the submission that received in the selected date range.
Avg handling time for touchless submissions	Number	The average handling time for all the submission that received in the selected date range and their handling was automatic only.
Avg handling time for submissions with exceptions	Number	The average handling time for all the submission that received in the selected date range and their handling involved manual intervention due to exception.
Avg time to complete exception tasks	Multi Bar	Average time to handle each exception type per month.

Dashboard UWM Touchless Operations

Name	Type	Description
Avg percentage of manual work	%	Percentage of all the Submissions which had an exception along the way and required manual intervention.
Fully automated vs manual interventions	Donut Chart	Number of Submissions which required manual intervention vs the number of Submissions which were fully automated.
Submissions Exceptions	Multi Bar	Submissions Exceptions per month by exceptions type.

Microsoft Power BI Dashboard example



Dashboard Underwriter Portfolio

Name	Type	Description
Yearly Target	Number	Shows the yearly target of the selected UW.
Actual Revenue	Number	Shows the actual revenue of the selected UW.
Percentage	%	The percentage of meeting the targets.
Yearly Performance by Q	Table	Table that shows the following for the selected UW: <ul style="list-style-type: none"> Revenue planned per each Q and yearly total. Actual Revenue per each Q and yearly total. LR (loss Ratio)* per each Q and yearly total. Actual LR per each Q and yearly total. <p>*LR is calculated as sum of all claims amount/Total Revenue.</p>
Plan vs Actual Revenue	Multi Bar	Planned vs Actual revenue per each Q in the selected year (of all underwriters together).

Dashboard Accounts Performance

Name	Type	Description
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Name	Type	Description
Bottom 3 active account performance (YTD) by Loss Ratio	Table	<p>A table that shows the following:</p> <ul style="list-style-type: none"> • Insured ID • Insured Name • Total Revenue from the insured • Loss Ratio <p>Sorted by the Loss Ratio – to show the 3 accounts which their loss ratios were the highest.</p> <p>There is an option to drill to the claims which account was made.</p>
Top 3 Broker Firms Performance (YTD) by Revenue	Table	<p>A table that shows the following:</p> <ol style="list-style-type: none"> 1. Broker ID 2. Broker Firm Name 3. Total Revenue from the broker 4. Loss Ratio <p>Sorted by Total Revenue to show the 3 brokers who had the highest revenue.</p> <p>There is an option to drill to the policies revenue of each broker.</p>