



XactInsights

Insightful Reporting Simplified



XactInsights helps you quickly find key business insights with ease. It streamlines data discovery and reporting, making it faster and more intuitive to access the information that matters most.

How does it work?

XactInsights is a fully self-service reporting tool that's easy to use. It's fast and simple to set up and begin digging into standard, prebuilt Liveboards. You can also easily build the metrics that matter most to your business using everyday claims language. Navigate data within XactInsights effortlessly with familiar industry terminology.

Timesaving features

XactInsights is constantly learning. Not only can you use everyday language and industry-specific terms to search and organize your claims data, but as new terms emerge and familiar terms evolve, XactInsights will learn and incorporate them into its search algorithms.

Creating and sharing Reports

In XactInsights, you build reports by creating "Answers" and collecting them on "Liveboards."

Answers can be collected from your team members' queries, from other people's Liveboards, and from your own personal searches.

For example, say you want to compare average estimate amounts between California and Texas for 2024 and 2025.

1. Type "[average gross estimate amount] [risk state]," use a filter on Risk State for CA and TX, and type "2024 vs 2025."
2. Add the generated Answers to a Liveboard.
3. Organize, share, or reuse that Liveboard later.



XactInsights Reports can include:

- Assignment counts
- Average estimate values
- Specific CAT event data
- Cycle times
- Roofing repair vs replace
- Industry & Peer data/comparisons
- XactXpert™ estimating behavior analysis
- And much more

Creating and using your Liveboards

XactInsights empowers users to create dynamic Liveboards, where key data points and visualizations can be pinned for easy reference and enterprise-wide sharing. Authors can craft custom Liveboards tailored to specific business needs, ensuring that critical metrics are always at their fingertips. These Liveboards are dynamic and can be configured to automatically refresh using whatever timeframe is best for you.

The variety of visualized KPIs is virtually limitless but common uses include:

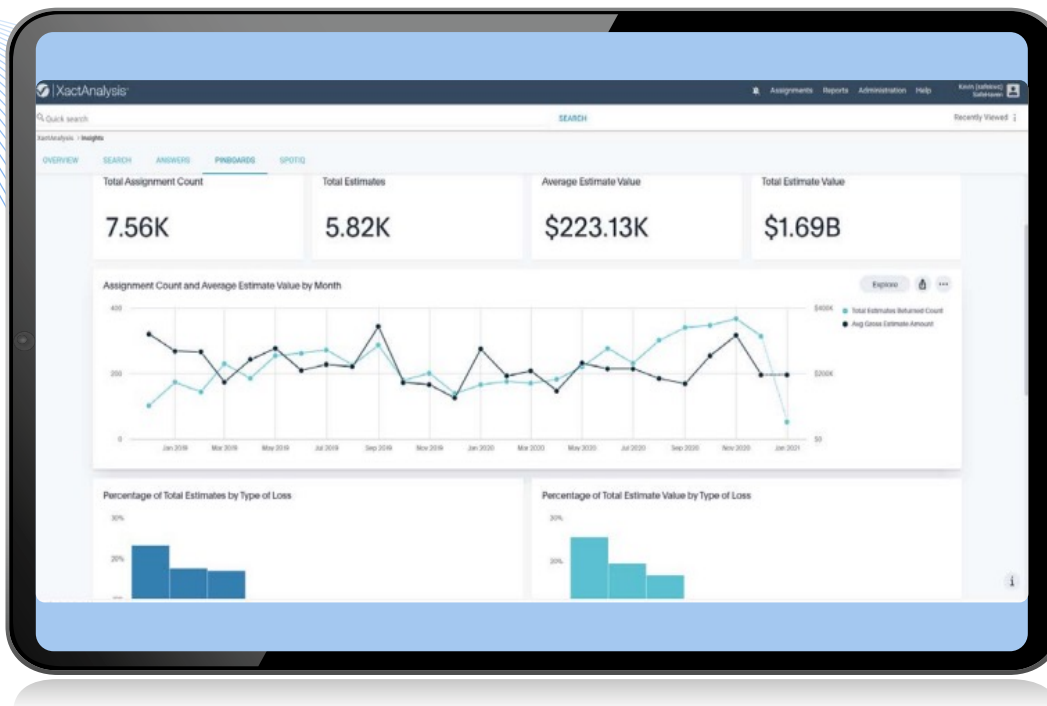
- Cycle times across your organization over the past year
- Claim density geographically organized nationwide
- Trend comparisons between counties, postcodes, or individual estimates
- Side-by-side comparison of assignees, contractors, or adjuster's efficacy
- Event-specific data compilation

Did you know?

The more you use XactInsights, the smarter the program becomes. Autocomplete is driven by your personal searches as well as the searches of others within your company.

Did you know?

Any answer or Liveboard can be downloaded to PNG, XLSX or CSV for use with other platforms.



Comparing your data with the industry

One of the most exciting aspects of XactInsights is the ability to compare your company's data and analysis with the industry. Available for U.S. and Canadian markets, industry insights feature holistic industry information and comparison with your Peer Groups (when available) and the AM Best Top 10 and Top 25.

Did you know?

Reports can be scheduled to deliver an updated PDF or excel email attachment on the schedule that best fits your needs further streamlining your workflows.

Empowering IAs and Contractors

XactInsights isn't just for carriers—it's a powerful tool for independent adjusters and contractors as well. These professionals can leverage the platform to review Service Level Agreement compliance, track performance metrics, and gain valuable insights into their operations. For IAs, this means better management of claim handling timelines and quality standards. Contractors can use Insights to monitor job progress, analyze estimating patterns, and identify areas for efficiency improvements. By providing a comprehensive view of their business operations, XactInsights empowers IAs and contractors to make data-driven decisions, enhance their service delivery, and ultimately strengthen their relationships with carriers and policyholders.



Activating XactInsights

XactInsights is available to all XactAnalysis customers. Contact your account representative to activate XactInsights.

Find our online training for XactInsights in the Xactware Classroom.

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