

Team tasks				
This week				
	Owner	Timeline	Status	
Finalize kickoff materials			Done	
Refine objectives			Working on it	
Identify key resources			Done	
Test plan			Stuck	
Next week				
	Owner	Timeline	Status	Time Tracking
Update contractor agreement			Working on it	3h 17m 16s
Conduct a risk assessment			Done	5h 14m 27s
Monitor budget			Stuck	9h 14m 27s
Develop communication plan			Working on it	7h 14m 27s

When **Status** changes to **Working on it**, notify **Team** and start **Time tracking**

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Claims & Operations

Turning Claims Management into a Data-Driven Process

THE CHALLENGE

Claims management requires continuous tracking, communication, and adherence to service standards.

Previously, reporting was heavily dependent on spreadsheets and manual follow-ups.

RESULTS AT A GLANCE

Complete Claims Visibility

The team now has a live view of every claim across all business units.

Elimination of Excel Reporting

Claims reporting is now fully managed inside monday.com.

Improved Accountability

Missed SLAs are immediately flagged, allowing managers to act proactively.

CLIENT SERVICES PERSPECTIVE

"All status updates have an SLA appointed and when these are missed, they are flagged for immediate updates and action so that nothing falls through the cracks."

THE SOLUTION

Everything.Insure consolidated claims operations into monday.com and introduced:

- ✓ Automated task logging
- ✓ SLA monitoring
- ✓ Centralized claims dashboards
- ✓ Cross-department collaboration
- ✓ Automated deadline management

Better Collaboration

Claims and Client Services teams now work from shared workflows to improve response times and service delivery.

- Escalation trends
- SLA compliance
- Delivery time performance

KEY OUTCOME

From claims initiation through resolution, teams now have a transparent, data-driven process that improves service quality and operational control.



PARTNER SPOTLIGHT: Why Everything.Insure Chose The CRM Team

Technology alone does not drive transformation. Successful adoption depends on having the right implementation and support partner.

For Everything.Insure, The CRM Team played a key role in ensuring ongoing support and optimization.

"To be honest, if I ever need anything, Jarad is always available. I recently added another group company to their own monday.com instance and it was immediately added to my profile so I could oversee everything. They are quick, efficient, and always willing to help."

PARTNERSHIP IMPACT

- Responsive support
- Rapid implementation assistance
- Ongoing optimization guidance
- Multi-company scalability
- Trusted strategic partnership

CLOSING RECOMMENDATION

"Just do it, you won't regret it. If you put in the effort to scope out your requirements correctly before implementation, you will save yourself a lot of time down the line as the system is extremely easy to use and setup."

Tyne van der Merwe

HEAD OF SALES AND DATA ANALYTICS

Everything.Insure