

References for insurance investigation services - some key themes

Here are some themes, values, and issues to which referees may be guided in formulating their statement of support for the investigative, surveillance, and other support services which you provide to the insurance sector.

Knowledge

- Circumstances under which the referee has come to know your services
- Background to referee's personal involvement in dealings with you and your firm.

Similar experience

- Description of the nature of services you provide.

Expertise

- Authoritativeness of your technical advice
- Quality of your investigations
- Your expertise in dealing with range of issues arising in these matters
- Standing of your "experts" in the industry/field.

Timeliness

- Meeting service standards
- Dependability and consistency
- Working to deadlines
- Approach to urgent matters.

Accessibility

- Convenient availability of your team.

Resources

- Depth of your team
- Credentials of your people
- Trustworthiness and dependability
- Correct allocation of technical resources
- Appropriateness of delegation.

Appropriateness for insurance market

- Right type/style of services and investigations.

Understanding of business environment

- Appreciation of client's business challenges
- Understanding of industry concerns
- Respect for legislative framework: privacy, etc.

Communication and feedback

- Appropriateness and timeliness
- Reporting and updating on progress of files
- Seeking feedback on satisfaction with services.

Teamwork and cooperation

- With claims managers and officers
- With other experts (e.g. lawyers)
- Cooperation with brokers and insureds.

Cost-effectiveness

- Cost-effectiveness of services
- Strategic value in terms of results.

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Billing

- Accuracy, timeliness, frequency, level of detail, format of bills.

Results focus

- Referee's assessment of your pro-activity in servicing matters quickly and at minimum expense.

Conflict of interest

- Recognition of areas of potential conflict
- Conflict avoidance
- Resolution of conflict situations.

Quality

- Observable effects of your quality programme in action
- Assurance resulting from your quality initiatives.

Work quality reviews and surveys

- Comments on your client satisfaction programme
- Positive effects from your processes to assess referee's satisfaction.

Value added services

- Areas where you have added value to the relationship with special/extra services
- Technology links.

Ease of dealings

- How you and your people are consistently easy to work with
- Effectiveness of relationship management.

Value for money

- Appreciation of value
- Comparisons (favourable) with other providers.

Differentiation

- Key differences in the experience of working with your firm from others
- Contrasts with competitor firms
- "Client-friendliness"
- Why your firm is favoured.