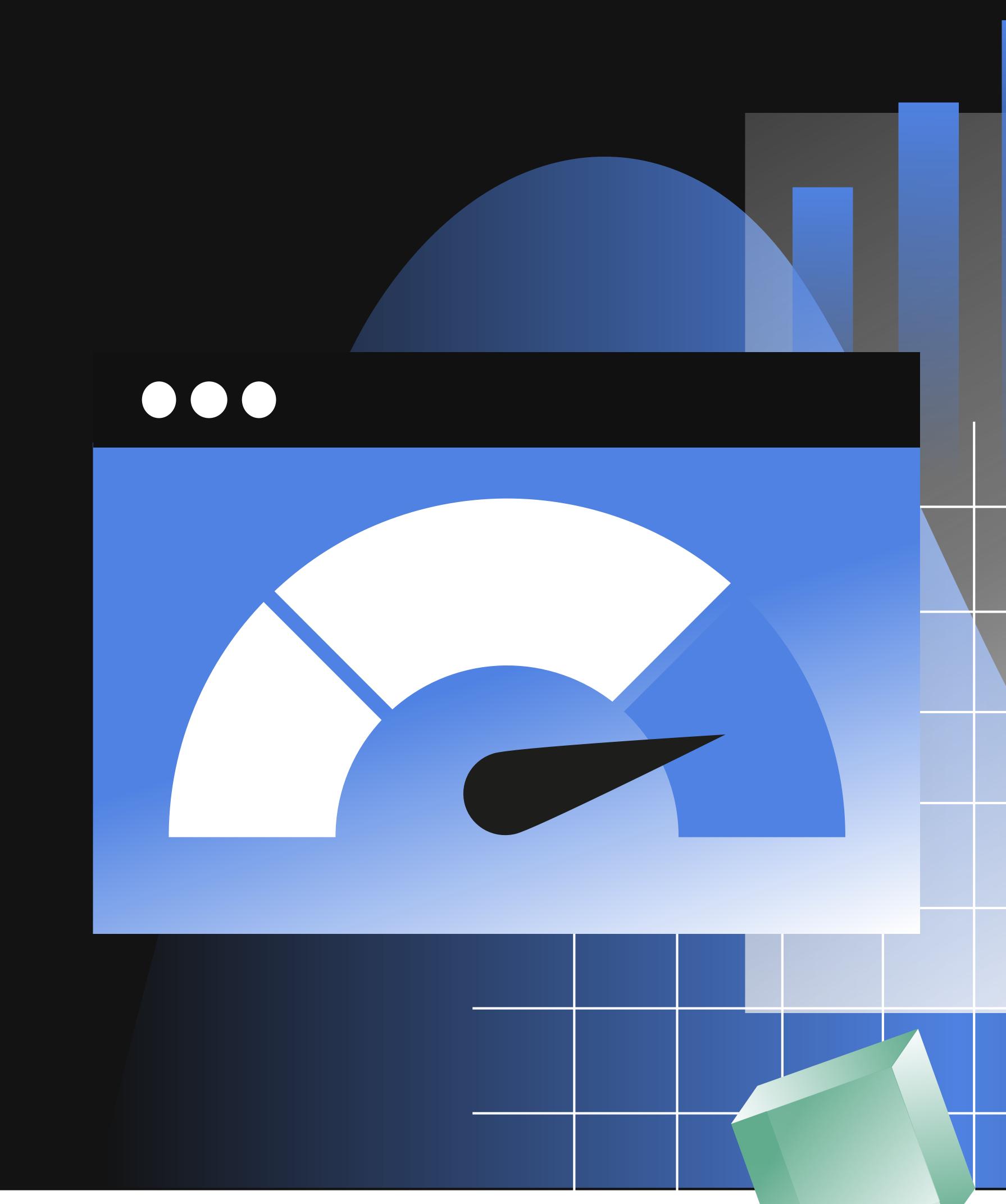
CASE STUDY

How Swarts Manning Transformed Policy Review with Checkk Al

Cutting Review Time in Half, Improving Accuracy, and Scaling with Confidence





Swarts Manning is a highperforming, multi-state insurance agency

- 3 offices in Nevada, Utah, and California
- 50–60 employees, with
 90% focus on commercial
 lines
- A specialty in middlemarket clients (accounts \$100K+ in premium), with some small business

They pride themselves on accuracy, consistency, and client trust—which makes every policy review critical to their process.

The Challenge

Policy checking was consuming too much time and too many resources—and mistakes still slipped through.

At Swarts Manning, every renewal is reviewed to avoid E&O exposure and ensure proper coverage. But the process was grueling:

- 15–30 minutes per policy on manual reviews
- 50–80 policies to review each week
- Complex middle-market accounts and policies with nuanced changes

They attempted to outsource to virtual assistants in the Philippines, but the solution didn't stick:

- Constant retraining
- Long turnaround times (up to a week)
- Persistent manual errors
- Inability to catch subtle but crucial changes in forms or endorsements

Even experienced Account Managers were overwhelmed—and training new hires, especially those unfamiliar with commercial lines, was difficult and inefficient.



The Solution: Checkk Al

Swarts Manning adopted **Checkk AI** in March to streamline their renewal workflows. The platform now serves as their go-to system for automated policy reviews, quote comparisons, and E&O mitigation

Key features they rely on:

- Al-powered document comparison (policies, quotes, binders)
- In-depth form, exclusion, and endorsement tracking
- Spreadsheet exports, policy chat feature
- Ease of use and 1-day implementation

"The document comparison feature has easily cut our review time in half, and we've been able to add a process of comparing to the binder and quote because it's so easy."

Jennifer Trested, Commercial LinesDirector at Swarts Manning

The Results

50-90% Reduction in Policy Review Time

Avg. review time per comparison: 4.9 min (based on new commercial CSR — more experienced CSR's fell between 3-4 min)

Faster Onboarding & Training

Swarts Manning hired a team member with zero commercial lines experience—and thanks to Checkk, they were reviewing complex policies effectively from day one. "This helps us train new hires faster – it shows them exactly where to focus."

40% More Errors Caught

From typos and missing names to changes in endorsements and coverage limits, Checkk Al surfaces the small differences that are easy to miss. "We've caught more errors because Checkk immediately shows us what's actually changed."

Lower Costs, Higher Efficiency

Compared to outsourcing, Checkk Al is more affordable, more consistent, and empowers in-house staff to handle more volume without increasing headcount.

Looking Ahead

Swarts Manning is now expanding Checkk Al usage across departments:

- Producers are using the platform for new business quote comparisons
- Internal teams are replacing time-intensive spreadsheets with automated reports
- Excitement is building for AMS integrations (like Epic), email automations, and other enhancements

With Checkk AI, Swarts Manning is not just keeping up—they're leading the way in modernizing insurance operations.