SCALEHOUSE AI

A few questions. Grab a pen.

How long does it take your team to set up a *new customer file?*

_____ minutes

How many clicks does it take to build *one renewal?*

_____ clicks

How many times does the same submission get *typed in again?*

_____ times

Ever look at a screen and wonder *why it's even there?*

☐ Yes ☐ No

Did anyone who's actually worked in insurance *design your system?*

☐ Yes ☐ No

If you winced, turn this over.

SCALEHOUSE AI

Most agency software was built by people who've never set up a renewal file. Ours wasn't.

We're insurance operators. We've set up the files, chased the certificates and rekeyed the submissions ourselves. **Scalehouse takes that work off your team's plate** and runs alongside the agency management system you already use.

Here's what runs on its own. **Your team signs off on anything that goes out.**

01 **A new customer comes on.**
The file is set up from the documents they send. No blank screens.

02 **An email lands.**
It's read, sorted and routed, with a reply drafted for your team.

03 **A submission comes in.**
ACORDs, apps and dec pages become clean data, typed once.

04 **A renewal is coming up.**
It's flagged early, the file is built and the remarket is prepped.

05 **A change request shows up.**
The endorsement is drafted and invoiced, ready for review.

06 **A client needs a certificate.**
The COI is prepped and waiting for one click to send.

It starts with a *Weigh-In.*

Before we build anything, we weigh your book: where the revenue lives, where the volume is, where the hours go. You get a Scale Ticket, a ranked plan of what to automate first. Your book data stays under NDA.

WEIGH — PLAN — BUILD — RUN

Bring *your* answers.

Thirty minutes, free, with people who've done the job. If your numbers make sense for automation, the next step is your Weigh-In.

Free consultation
[phone] · [email]