

PLATFORM OVERVIEW

Understand the insurance. Move the agreement forward.

Two clear tasks for commercial teams: review insurance in an agreement, or understand the insurance evidence in front of you.

01 Review Insurance in an Agreement

Describe the work and add the relevant insurance wording. Confirm who must carry insurance. Include a location only when it matters; multiple countries, global activity and remote work can all be described. Start with the answer, why it matters and the next action. Open the detail for the wording and questions behind the recommendation.

02 Check Insurance Evidence

Explain a certificate, broker letter, endorsement or other insurance document on its own. Or compare its stated facts with an agreement requirement or a claimed insurance position. Keep the product, amount, currency, limit basis and dates together. Missing or conflicting information remains visible; a displayed amount does not establish coverage.

Prepare the next conversation

Use proposed agreement wording when a change can be supported. A decision brief keeps the answer and next action together; a broker handoff organizes questions for an adviser. Review each download before sharing it. Downloading a handoff does not send it to anyone.

Keep a useful record

Agreement drafts can save automatically after required wording authorization. Earlier saved answers remain accessible while you edit; changed facts need a new analysis. Record the organization's decision separately. Company Standards saves reusable positions. Evidence checks stay in the open session and are not saved as agreement reviews.

Begin with what you have

Paste the relevant text. Where file controls are available, add a document or clear image and check the extracted wording. Use only information you are authorized to process and follow your organization's confidentiality requirements.