THE FIX LIST

Claims Operations, *first-quarter planning.*

Fernhill Mutual. 34 people across intake, adjusting and partner support.

INSIDE

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Prepared by Kasey&Co.

Sample. Fernhill Mutual and everything in this document are invented to show the format. Not client work.

WHAT WE HEARD

Three questions, asked before the session and in the room.

Counts are how many of the 34 people raised each point, in the pre-survey (answers not attributed) or the session.

What's working?

The weekly adjuster huddle	21
The new intake form	17
Seniors coaching new adjusters	12
The partner team answers fast	9

What's a challenge?

Claim status lives in three places	26
Nobody owns the shared claims inbox	22
Reopened claims are re-entered by hand	15
The Friday report is rebuilt every week	8
Priorities change mid-quarter, unannounced	14

What's an opportunity?

Route new claims by type, automatically	19
One status view partners can see	16
AI summaries of claim emails, reviewed by a person	11
A named owner for every queue	18

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THE FIX LIST

What to do with each, who owns it, and the next step.

	FIX	BREAKS	BLOCKS	OWNER	NEXT STEP, OR WHY NOT	GOAL
ACT	owner and first step					
1	**Name an owner for the shared claims inbox** RISK REVIEWED	Daily	Claimants	Intake lead	Owner named at the next team meeting	G1
2	**One place for claim status**	Daily	The team	Operations manager	Map every place status is written today	G2
3	**Route new claims by type**	Daily	Claimants	Intake lead	List claim types and today's routing rules	G1
4	**A status view for partners**	Weekly	Partners	Partner support lead	Agree the five fields partners ask about	G3
INVESTIGATE	a question and a date to decide					
?	**Decide where AI helps intake**	Daily	The team	Operations manager	Do summaries hold up on 20 real emails? Decide by week 6	G4
?	**Notice before priorities change**	Monthly	The team	Claims director	Can leadership give a week's notice? Decide by month 2	None
PARK	the reason, and what brings it back					
–	~~Automate the Friday report~~	Weekly	One person	–	One person, no current goal. Revisit if it grows past one person	None

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FIXES AGAINST THIS QUARTER'S GOALS

Most fixes serve a goal. One without a goal still gets a look.

	Inbox owner	One status	Route by type	Partner view	AI at intake	Friday report	Priority notice
G1 Faster first contact with claimants	●		●		○		
G2 Fewer handoff errors, intake to adjuster		●	○				
G3 Partner portal live on schedule		○		●			
G4 A decision on the AI intake pilot					●		

● serves the goal ○ helps it Shaded columns serve no current goal: one is investigated, one parked.

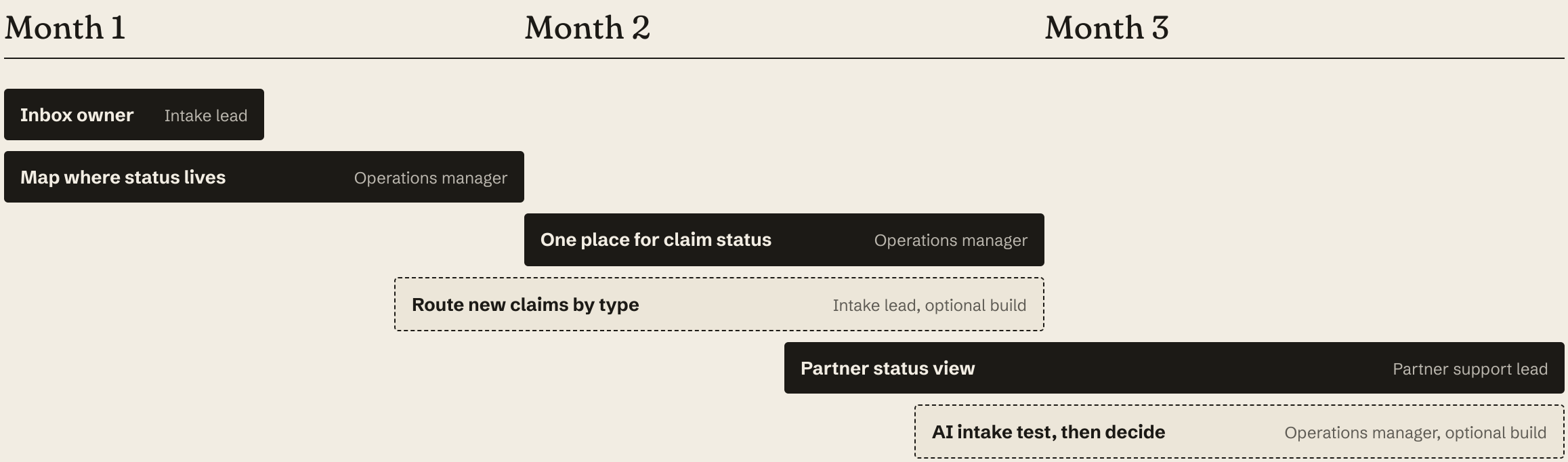


Who it blocks, by how often it breaks. Top right comes first. Hollow points serve no current goal.

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THE QUARTER, IN ORDER

Small and owned first. Builds once the basics hold.



AFTER THE SESSION, IF YOU WANT IT

The two lighter bars are where outside help could build. They are options, not part of the Fix List, and each would be scoped on its own.

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