

PCMI | LIVE WEBINAR

NEW NOTIFICATION CENTER MODULE

Starts @ 11AM CST



pcmicorp.com/about/leadership

HOSTS: MARK AND GREG

GUEST: STEVE HENDRICK @ BERKONE

MARK NAGELVOORT

PRESIDENT & CEO

mark.nagelvoort@pcmicorp.com

- 30+ years of industry experience
- Founded PCMI in 2012



GREG KASPRZYCKI

CHIEF OPERATING OFFICER

greg.kasprzycki@pcmicorp.com

- Spent his career working alongside Mark
- Responsible for the strategy and execution of our product roadmap



STEVE HENDRICK

DIRECTOR OF ENTERPRISE
SOLUTIONS

shendrick@berkone.com

- 24+ years in the Document Automation industry
- Focuses on enterprise solutions that bring the appropriate level of document automation to clients

berkone
Automating Content & Process





-  Open Sales Platform
-  F&I Reporting
-  Policy Administration
-  Claims Administration
-  Risk Management
-  Performance Reporting
-  Reinsurance
-  Notification Center

AGENDA

1

The Notification Center Module

- Benefits of Flexible Communication
- Functionality: Email and Text Notifications
- Functionality: Letters

2

BerkOne Overview

3

BerkOne & PCMI

- North American Capabilities
- Scalability, Volume & Services
- Security, Compliance & Standards

4

Demo

- Emails and Text Notifications
- Letter Builder

?

Q&A SESSION

How do you currently notify your agents and dealers
of important business events?

NEW

NOTIFICATION CENTER MODULE

Flexible Communication



BENEFITS OF FLEXIBLE COMMUNICATIONS



Empower and engage your agents and dealers like never before by:

- Catering to their needs + preferences
- Creating automated, efficient correspondence during important business events

FUNCTIONALITY: EMAIL & TEXTS



1. Allows administrators to configure emails and text notifications that best fit the receiver's needs and preferences via:
 - Event-based triggers
 - Specific configurations (dollar amount, miles, or days)
2. Multi-language capabilities

FUNCTIONALITY: EMAIL & TEXTS

DENIED CLAIM:

notify agent in case an issue needs to be resolved ✓

FIRST CONTRACT SOLD:

alert agent so they can congratulate dealer ✓

WEEKLY REPORTS:

monitor contract and claim counts ✓

HIGH DOLLAR CLAIMS:

alert reinsurance dealer before approved ✓

NO CONTRACT SOLD FOR (X) DAYS:

allow agent to open communication with dealer to resolve issues ✓



FUNCTIONALITY: LETTERS



- PCMI has partnered with BerkOne to outsource all printing and mailing
- Helps maintain compliance

FUNCTIONALITY: LETTERS

MAINTAIN
COMPLIANCE ✓

REDUCE POSTAGE
AND HANDLING
OVERHEAD ✓

ARCHIVE COPIES OF
PHYSICAL LETTERS
FOR CUSTOMERS
WITHIN PCRS ✓





1936

FOUNDED

Founded as H. A. Berkheimer, a tax administration organization

85

YEARS

For 85 years, BerkOne has been a leader in content and process automation solutions, partnering with more than 1,000 organizations that require the highest levels of audit and compliance

280

FT EMPLOYEES

Full-Time Employees (less than 5% turnover)

160

TEMP EMPLOYEES

Recurring Temporary Employees

120

CERTIFICATIONS

Software Certifications



NORTH AMERICAN CAPABILITIES

ECONOMIES OF SCALE

Clients not only receive BerkOne's volume bulk mailing rates but also benefit from best-in-class equipment.

COMPLIANCE

From bank collateral, vendor checks, tax forms and HIPAA documents, we routinely handle highly sensitive mailings.

KNOWLEDGE

BerkOne's Printing and Mailing team understands design specifications and postage rules as well as barcode requirements.



SCALABILITY, VOLUME & SERVICES

VOLUME

1.3 Million – Average monthly volume processed through BerkOne Printing and Mailing (16M per year)

TRACKING

10,000 Postal Trays with Proprietary Tracking System

SERVICES

Services include: Forms Design, Printing, Intelligent Insertion, Postal Presort, Mailing, and more

WORKING WITH PCMI

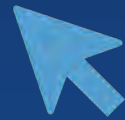
Working relationship with PCMI for nearly two years processing a monthly average of 5,000 client letters



SECURITY, COMPLIANCE & STANDARDS

We pride ourselves on maintaining the highest levels of security & compliance and regularly monitor legal regulations and standards that may affect our clients.





DEMO



Q&A SESSION

WANT TO LEARN MORE?

SCHEDULE A DEMO

pcmicorp.com/request-demo



OPEN SALES
PLATFORM



F&I REPORTING



POLICY
ADMINISTRATION



CLAIMS
ADMINISTRATION



RISK
MANAGEMENT



PERFORMANCE
REPORTING



REINSURANCE



NOTIFICATION
CENTER