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PolicyPro

Info Package



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You're Not Alone in Feeling Operationally Overloaded

If you're a brokerage leader, you don't need another tool — you need time, capacity, and relief.

Between renewals, downloads, accounting, system complexity, acquisitions, and staffing challenges, **administrative work** has quietly become one of the biggest blockers to growth.

PolicyPro exists to take that weight off your team.

We remove non-licensed, high-volume administrative work from your operation so your licensed staff can focus on clients, retention, and revenue — without hiring, burnout, or operational chaos.

What Is PolicyPro?

PolicyPro is Trufla's **dedicated policy administration and back-office support arm**, purpose-built for insurance brokerages.

Instead of adding headcount or asking licensed people to do admin work, PolicyPro gives you a **trained, embedded operational team** that works directly inside your existing workflows and systems.

This is not software.

This is not short-term outsourcing.

PolicyPro is a long-term operational partner designed to support how your brokerage actually runs.

Who PolicyPro Is Built For

PolicyPro is built to support insurance brokerages of all sizes and structures — wherever administrative pressure exists.

We support brokerages that are:

Feeling ongoing or seasonal administrative overload

Seeing licensed staff pulled into non-revenue work

Managing complexity across renewals, accounting, or service work

Growing, acquiring, or changing how they operate

Simply looking to run a more efficient, resilient operation



PolicyPro Works Alongside:



Small, mid-sized, and large brokerages



Personal lines, commercial lines, or mixed books



Single-location and multi-branch operations



System-Agnostic by Design

PolicyPro is not tied to any single BMS or technology stack.

Our team is trained to work across all major brokerage management systems and related tools, adapting to how your brokerage operates — not the other way around.

Whether your team is working in Epic, PowerBroker, TAM, SIG, TBW, or any other BMS, PolicyPro integrates into your existing environment and workflows.

If administrative work is creating pressure anywhere in your operation, PolicyPro can support it.

The Problems We Help You Solve

Brokerages typically reach out when:

- Licensed staff are buried in admin instead of serving clients
- Renewals and downloads are overwhelming internal capacity
- Accounting and commission reconciliation delay month-end close
- Acquisitions introduce operational risk and backlog
- Burnout and turnover start impacting service levels
- System or regulatory changes increase complexity overnight



PolicyPro provides immediate operational relief, while helping you build a more stable, scalable operation.



What PolicyPro Can Support

PolicyPro supports a wide range of administrative and operational functions. Scope is flexible and tailored to your brokerage.

Policy Administration & Service Support



Daily data downloads and cleanup



Transaction processing



Renewals support



Document handling and portal issuance



Remarketing and requote preparation

What PolicyPro Can Support

Accounting & Finance Support



Commission statement reconciliation



Accounting workflow support



Month-end close assistance



Data validation and reporting preparation



What PolicyPro Can Support

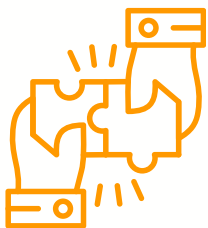
Surge, Change & Special Projects



Rollover periods



System migrations



Acquisition-related admin volume



Carrier or regulatory-driven workload increases



Most brokerages start with a focused scope and expand over time as trust and impact are established.

How PolicyPro Works With Your Brokerage

1. Discovery & Understanding

We take the time to understand how your brokerage actually operates — your systems, workflows, pressure points, and priorities.

2. Onboarding & Integration

Your PolicyPro team is trained on your processes and integrates directly into your daily operations.

3. Ongoing Support & Improvement

We deliver consistent day-to-day support while helping document, refine, and improve workflows where needed. As your brokerage grows or changes, PolicyPro adapts with you.



Real Insurance Expertise Behind the Work

PolicyPro is led and supported by recognized brokerage leaders with deep, hands-on insurance experience. This is not a delivery team learning insurance on the job — it is a service shaped and overseen by people who have spent their careers inside brokerages.



**Diane
Horsfield**

Diane Horsfield is a former broker owner and principal, and the architect of PolicyPro.

She designed PolicyPro based on firsthand experience running a brokerage — managing renewals, accounting pressure, staffing challenges, system complexity, and the constant pull of administrative work away from licensed staff.

Diane provides senior operational oversight for **PolicyPro**, ensuring the work being delivered reflects real brokerage standards, expectations, and best practices.

Real Insurance Expertise Behind the Work



**Jennifer
Donohue**

Jennifer is a seasoned brokerage operations leader with deep expertise in onboarding, process development, and execution. She has spent years working directly inside brokerages, translating day-to-day service, accounting, and administrative work into clear, repeatable processes.

Jennifer leads:

- Client onboarding and workflow design
- Process documentation and playbook development
- Training and quality assurance

Her role ensures **PolicyPro** integrates seamlessly into brokerage operations and delivers consistent, dependable results.

Real Insurance Expertise Behind the Work



Jennifer
Donohue



Diane
Horsfield

Together, **Diane and Jennifer** bring credibility, leadership, and accountability to **PolicyPro** — giving brokerages confidence that their operations are being supported by industry heavyweights who understand the business inside and out.

A Proven Trufla Operating Model You Can Trust

PolicyPro operates from the same Cairo head office that supports Trufla's technology development arm. This is not third-party outsourcing.

The **PolicyPro team** is part of Trufla's global organization and operates under the same:



Security standards



Governance



Infrastructure



Training and
quality controls

This proven model allows us to deliver consistent, professional support with stability and accountability.





Why Brokerages Choose PolicyPro

Brokerages partner with PolicyPro to:

- Reduce administrative workload
- Give licensed staff **time back** with clients
- **Scale** without panic hiring
- **Stabilize accounting** and month-end close
- **Navigate acquisitions** and system changes with confidence

Many clients start with one area of support and expand as they see the impact across their operation.



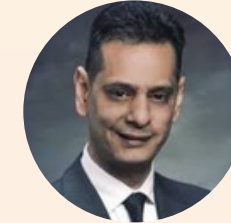
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I chose PolicyPro because I trust Trufla, Sherif, and Diane. Their industry expertise made outsourcing our admin work an easy decision—and being Canadian is a bonus! PolicyPro manages our renewals, endorsements, new business downloads, alerts for missing coverages or premium changes, as well as EDI, expiration lists, reporting, stale-dated activities, and direct bill reconciliation.

-GILLIAN VAN KEMPEN,
PRESIDENT & COO,
BEST BUY INSURANCE BROKERS

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Policy Pro Services has been a game-changer for Link Insurance. Their team seamlessly handles complex tasks like data downloads, accounting, and rollovers with unmatched efficiency, saving us time and ensuring accuracy. Their proactive approach to audits, data validation, and financial operations has significantly improved our processes. We highly recommend Policy Pro for any brokerage looking to streamline operations. Their service has been invaluable."

-TAREK YOUNAN
BRANCH PARTNER
LINK INSURANCE

What Happens Next

If you're wondering whether PolicyPro could help your brokerage, the next step is a free 30-minute discovery call.

Here, we will discuss your challenges, and whether operational support could make a meaningful difference for your team.



BOOK NOW



Book a discovery call to explore if PolicyPro is the right fit for your brokerage.



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Thank You

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