

billy Managed Service

CRIS-Certified Insurance Compliance, Fully Managed

Billy's Managed Service is built for organizations that require maximum accuracy, consistency, and risk reduction in insurance compliance without adding internal headcount.

The service combines Billy's automation and AI with CRIS-certified insurance compliance specialists who manage document review, follow-up, and reporting on your behalf. The result is higher accuracy, lower operational drag, and reduced compliance risk.

What Managed Service *Is*

Managed Service means Billy's Certificate Management Team, made up of CRIS-certified insurance professionals, actively manages your COI review and compliance tracking.

You define requirements and risk tolerance. Billy executes review, outreach, and documentation.

Included:

- CRIS-certified specialist reviews
- Detailed COI and endorsement verification
- Limits, exclusions, and form validation
- Direct vendor & broker communication
- Risk-aligned compliance outcomes
- Audit-ready records & reporting
- Policy-level review to confirm coverage aligns to stated requirements

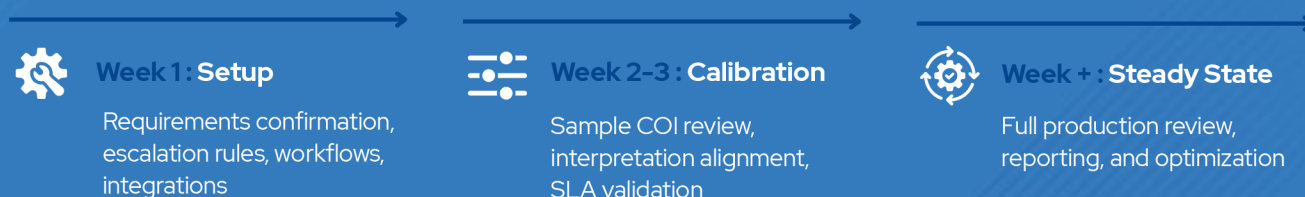
Outcome: Clean, defensible compliance with minimal internal effort.

How It Works



Onboarding Timeline

Typical go-live: ~ 30 days



Roles & Responsibilities

Billy Managed Service (CRIS-Certified)

- Document review & validation
- Vendor and broker communication
- Deficiency tracking & resolution
- Compliance reporting integrations

Your Team

- Owns compliance rules & risk tolerance
- Handles rare escalations
- Monitors status via dashboards

You stay in control without carrying the day-to-day workload

Is Managed Service Right for You?

Often a strong fit if:

- Compliance accuracy is highly visible
- Teams are resource-constrained
- Vendor follow-up is time-consuming
- Audit defensibility matters

Many clients start self-managed and add Managed Service as volume or risk increases.



Ready to simplify compliance?
Book your demo at billyforinsurance.com/demo

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