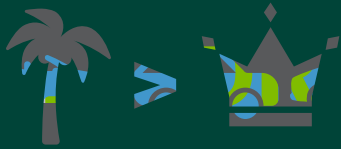




Pioneer Workshop: PowerPoint Foundations

June 5, 2025



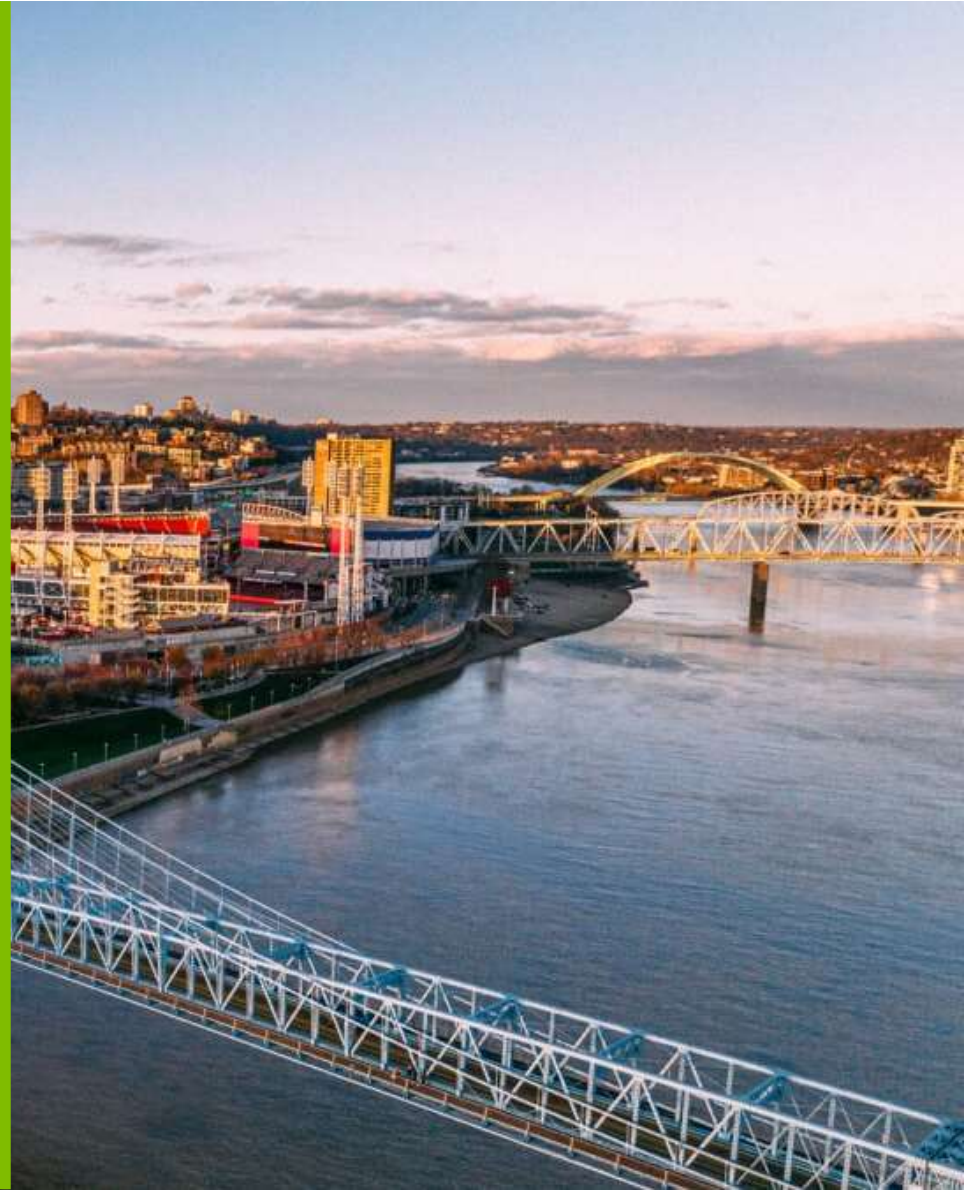


TSA Pre✓





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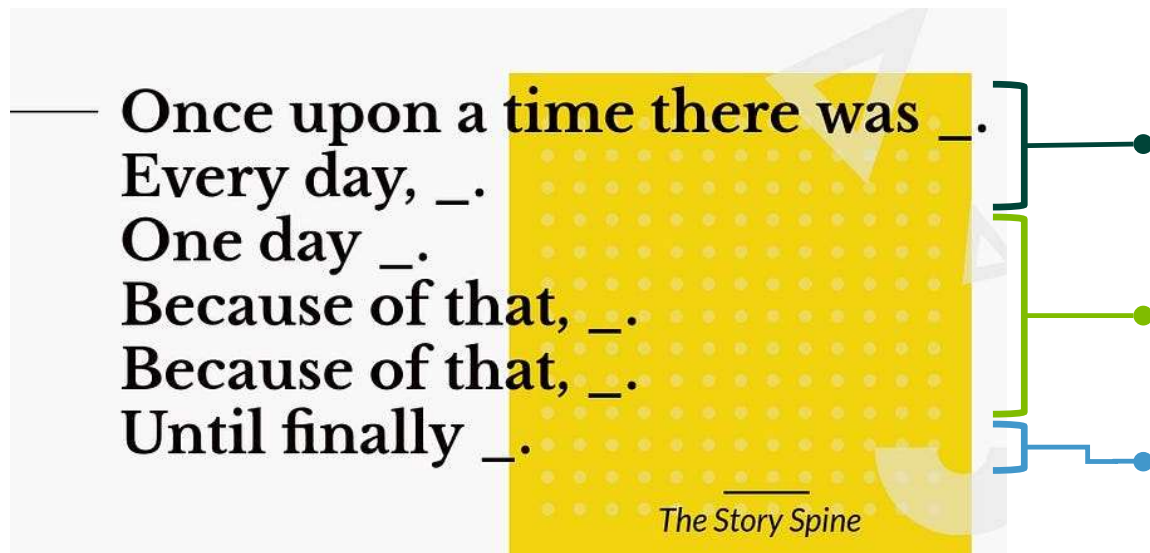
Agenda

- 01 Crafting Your Story
- 02 Communication Framework
- 03 What Would You Change?
- 04 Takeaways



Crafting Your Story

A Storytelling Framework



The Story Spine — Emma Coats

Business Translation:

What's the current state?

"We have this process, and it works like..."

What's the catalyst for change and solution steps?

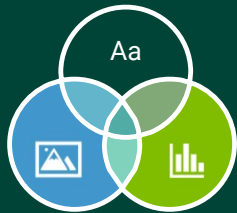
"We saw an increase in cancellations because..."

"So, we modified our..."

What's the resolution?

"As a result, we achieved..."

Why PowerPoint?



The most effective tool to combine text, imagery, and data



Best way to pace the audience and lead them through the story



If you follow basic principles, it forces concision and clarity*

* Risk of not having enough detail or being too broad



Communication Framework

The Framework Has Three Components



01

Know Your Objective

Think about what you want to accomplish with your message?

02

Know Your Audience

Think about how your recipients best digest information?

03

Know How to Say It

Think about how you phrase and structure the most effective message

What Are You Aiming to Accomplish?

01

Know Your Objective

02

Know Your Audience

03

Know How to Say It

Before you write, identify the purpose of your communication. This will be your guide to help you stay on point and craft a clear message. Usually, the purpose will be one of the following:

1. To Inform

- Updates
- Issues
- Status
- Capstone?

2. To Spur Action

- Work progress
- Prioritization
- Follow-Ups

3. To Request

- Approvals
- Reviews
- Feedback

4. To De-Escalate

- Clarification
- Accountability
- Re-Focus

How Well Do You Know Your Recipient(s)?

01

Know Your Objective



Is your audience external or internal?

Producer <-> SageSure

How you construct a message may differ if your recipient is a producer vs. a colleague.

02

Know Your Audience



How many people are you addressing?

1 → 2 → Many

More recipients means more effort to strike the right balance.



What's the level of your relationship with them?

Informal → Formal

The level of your relationship can dictate the tone and phrasing.

03

Know How to Say It



How detailed is your audience?

Summary <-> Details

Think about what your audience wants: The key takeaway or the nitty gritty.



How reactive is your audience?

Passive <-> Passionate

Consider how your audience will react to your message.

Make Your Words Count

01

Know Your Objective

EMPHASIZE THE POSITIVE

Grim: Your policy will be canceled if you don't repair your roof.

SPEAK THEIR LANGUAGE

Technical: HB 7065 created section 627.7152, Florida Statutes, which contains definitions and required provisions for AOBs.

FOCUS ON SOLUTIONS / BENEFITS

Dead End: We're not offering those incentives anymore.

02

Know Your Audience

03

Know How to Say It



Positive: To keep your home protected with SURE's top-rated coverage, please address the roof repair detailed below.



Digestible: Florida law dictates assignment of benefits (AOB) provisions.



Encouraging: While that incentive is no longer available, other rewards are coming soon.

Structure Speaks Volumes

01

Know Your Objective

02

Know Your Audience

03

Know How to Say It

Before we write our message, give thought to the way it should be constructed.

Structure: Narrative/Paragraph format

Provide some type of warm greeting. State why you're reaching out. If the recipient gets nothing else from this message, this is what you need them to know. If there are expectations, be crystal clear (action and timeline).

The space between these paragraphs is nice, isn't it? Here's where I would add some additional detail around the situation like why it happened or what caused it.

If I have more paragraphs before my closing, it's to provide more context without creating a massive block of text. If this is my closing, though, reiterate your key point and what's needed.

Structure: Sectioned

Provide some type of warm greeting. State why you're reaching out. If the recipient gets nothing else from this message, this is what you need them to know.

Actions:

- If there are expectations, be crystal clear
 - Action
 - Timeline

Additional Context:

Here's where I would add some additional detail around the situation like:

- Why it happened
- What caused it.

Close out by reiterating your key point and what's needed.



What Would You Change?

Historical Production Scoring

A Longer-Term View of Our Partnerships



Historical Production

We look at...

Policy count, MoM bound variation, and avg. number of policy terms, with a state-specific view

In order to...

Differentiate deep partnerships with consistent engagement

Scoring Inputs



Total Active Policy Count Since Agency's First Bound Policy



Month-Over-Month Bound Policy Variation (i.e., production volatility)



Average Number of Policy Terms for Active Policies

Rationale

Relative size is used to weight the following inputs

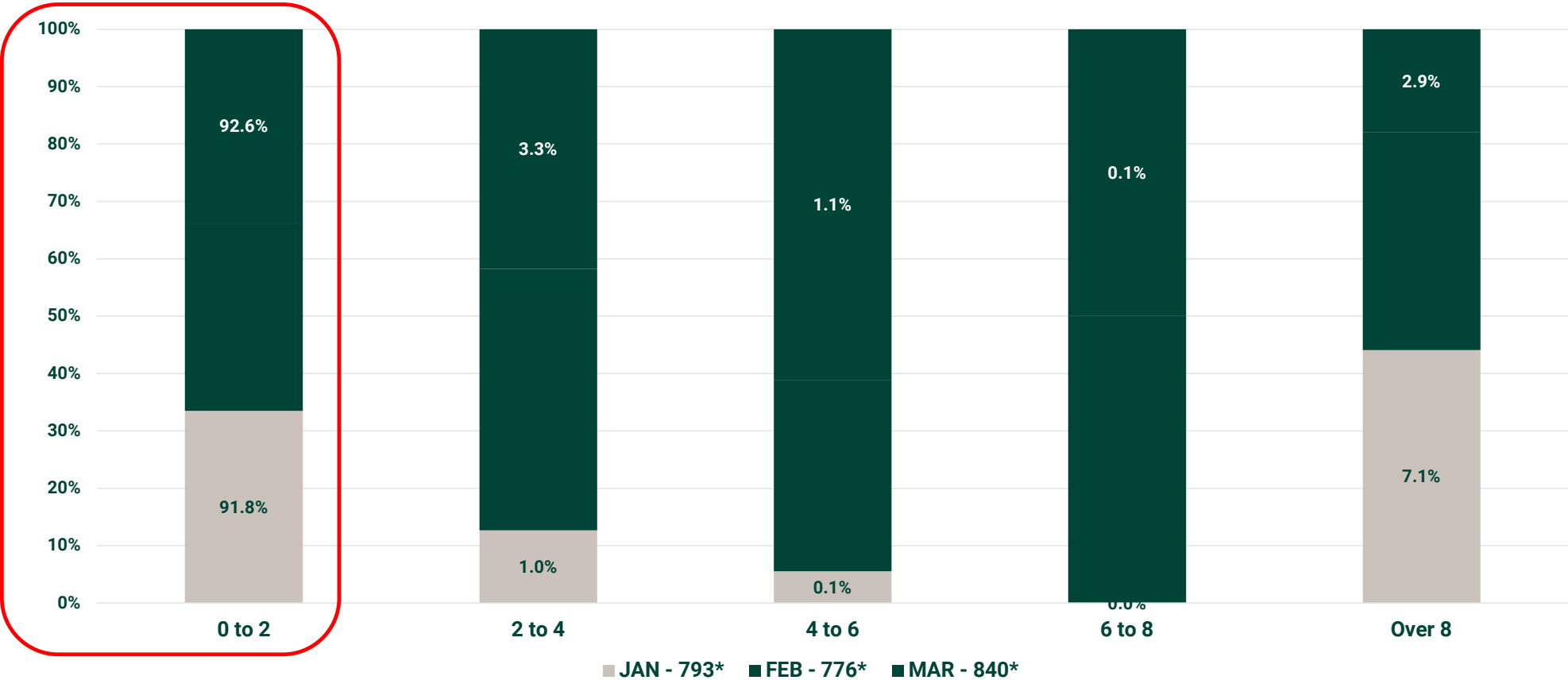
Provides an indication of overall production consistency

Indicates a commitment to renewing policies, all else being equal

Output Use

Combined, the outputs provide a complementary view when coupled with other dimensional scores and a different perspective on how we define long-term partnerships

Chart Example



Example 3

What is a Prioritization Framework?

A prioritization framework is a structured approach or methodology used to make informed decisions about the allocation of resources, time, or attention to various tasks, projects, or goals. It helps individuals or organizations determine what should be done first, what can be delayed, and what might not be worth pursuing at all. Prioritization frameworks are commonly used in business, project management, personal productivity, and various other contexts to ensure that efforts are focused on the most important and impactful activities.

Here are some key elements and principles commonly found in prioritization frameworks:

1. **Criteria:** Establish clear criteria or factors that will be used to evaluate and rank items for prioritization. These criteria could include factors like importance, urgency, cost, potential return on investment, alignment with strategic goals, and feasibility.
2. **Scoring or Weighting:** Assign scores or weights to each criterion to reflect their relative importance. This helps in quantifying the importance of each factor in the decision-making process.
3. **Data Collection:** Gather data and information relevant to the items being prioritized. This could involve market research, financial analysis, customer feedback, or other sources of information.
4. **Ranking:** Apply the criteria and scoring to each item to create a ranked list. This list represents the order in which items should be addressed or pursued.
5. **Review and Adjustment:** Regularly review and update the prioritization list as circumstances change or new information becomes available. Priorities may shift over time.
6. **Resource Allocation:** Allocate resources (such as time, budget, and manpower) to the top-ranked items according to the established priorities.
7. **Communication:** Communicate the prioritization decisions to relevant stakeholders, teams, or individuals to ensure alignment and understanding of the chosen priorities.



Takeaways

Dos and Don'ts

DO	DON'T
Remember you're telling a story	Treat the deck as a documentation file
Incorporate whitespace on your slide	Have the equivalent of a blank slide
Provide relevant content and insights	Overcrowd your slide with text and excessive information
Use available tools like shapes, lines, and tables to organize information	Create a visual that the audience doesn't know how to navigate
Stick with the core color scheme	Re-create a Candy Crush level
Use fonts consistently (bolding, size, color, etc.)	Think that people will ignore the details
Leverage data visualization to enhance your insights	Use charts that will create confusion on what the point is
Be consistent with the types of data visualizations used	Insert every type of chart possible
Proofread and edit...then do both again	Assume you nailed in on the first draft

The goal is to create a deck that's compelling, consistent, and concise



Reference Material

Tips for Creating Awesome Decks

IMAGES

- Use SVGs when you can – they won't lose resolution when resized.
- To enlarge or shrink an image, hold down the shift key while sizing to lock the ratios.
- Compress images using tinypng.com to reduce the file size of the deck.

FORMATTING

- Make sure every content page has a logo, page number, and disclaimer in the footer.
- Choose a template from the "New Slide" dropdown on the Home toolbar menu.
- Use Roboto Slab Medium in title case for headlines and Roboto Medium in uppercase for subtitles.
- Use either Roboto Regular or Light for body text.

HELP

- Need a new layout template? Email us at brand@sagesure.com.

Appendix

Sagesure Brand Portal



BRING OUR BRAND TO LIFE

The SageSure Brand Portal is your toolbox for everything you need to confidently represent our brand. From logos to templates it's designed to make it easy for you to create on-brand materials that align with our identity.




By using the tools and resources available here, you play an essential role in maintaining a consistent brand presence. Not sure where to start? Our **Brand Guidelines** offer clear directions to help you apply our brand elements with confidence.

Whether you are searching for brand images or sprucing up your LinkedIn profile, the portal has you covered. **If you have any questions or need additional support, we are here to help!** Reach out to the Brand Team at brand@sagesure.com.



SageSure Rewards

A producer loyalty & rewards infrastructure designed to drive and reward producer behaviors that actively contribute to SageSure's strategic goals of enhanced profitability, diversified growth, and superior engagement—while retaining the flexibility to adjust to changing market conditions.

	 Enhancing Profitability	 Driving Diversified Growth	 Rewarding Engagement
Strategic Levers	<ul style="list-style-type: none"> • Loss Ratios • Quality of Business • Renewal Retention • New Business Retention 	<ul style="list-style-type: none"> • Geographic Diversifying Growth • Product Diversification & Utilization <ul style="list-style-type: none"> • Commercial • Expanded Markets • Flood • Etc. 	<ul style="list-style-type: none"> • MySageSure Enrollment • Paperless Enrollment • Completion of an online review Post bind • Providing a valid email at bind • Innovation / Home Services

2023 Highlights

Consultative First Notice of Loss (FNOL)



SageSure launched a revamped FNOL Process designed to provide policyholders with a more interactive and informative customer experience.

Water Mitigation At FNOL



SageSure has begun offering Water Mitigation Referral Services during the FNOL process, allowing us to respond more quickly to customer needs in their time of crisis.

Preferred Method of Inspection Tool (PMOI)



SageSure developed a PMOI tool which allows adjusters to review claims with policyholders and recommend a method of inspection that best fits the needs of the claim and the customer. Enables managed repair assignments, to include Roof Marketplace

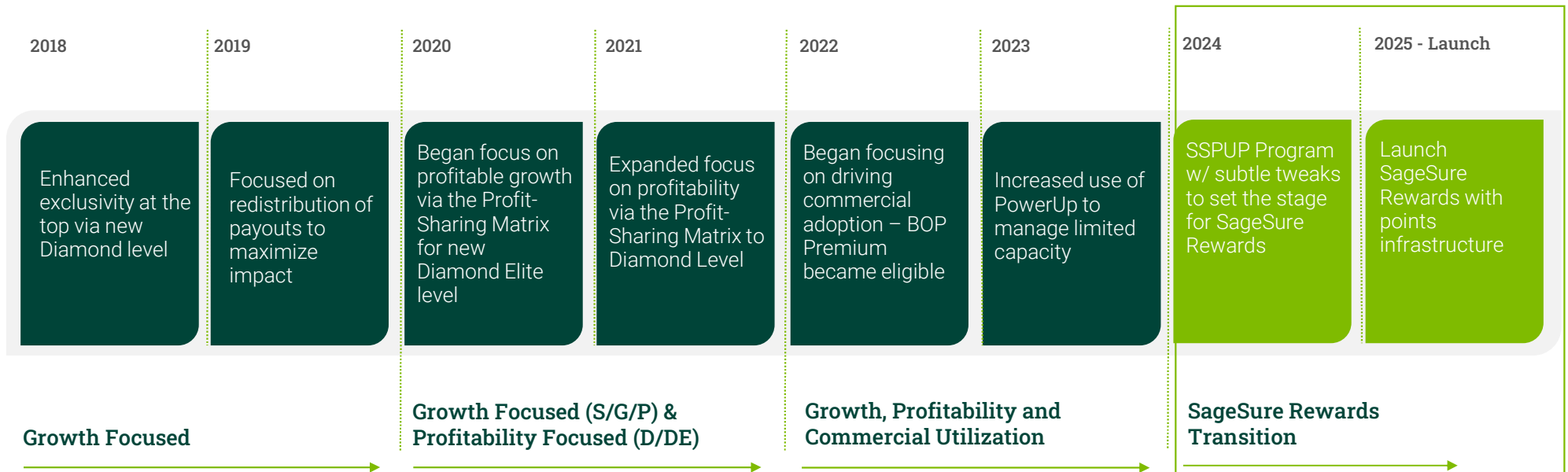
SageSure Field Team



SageSure hired, trained, and deployed our first field team to complete inspections in Texas and Louisiana. In 2023, this team completed 860 assignments with an average time to inspection of 4.5 days.

Evolution of SageSure PowerUp

SSPUP HAS BEEN EVOLVING TO SUPPORT OUR MUTUAL SUCCESS SINCE 2018



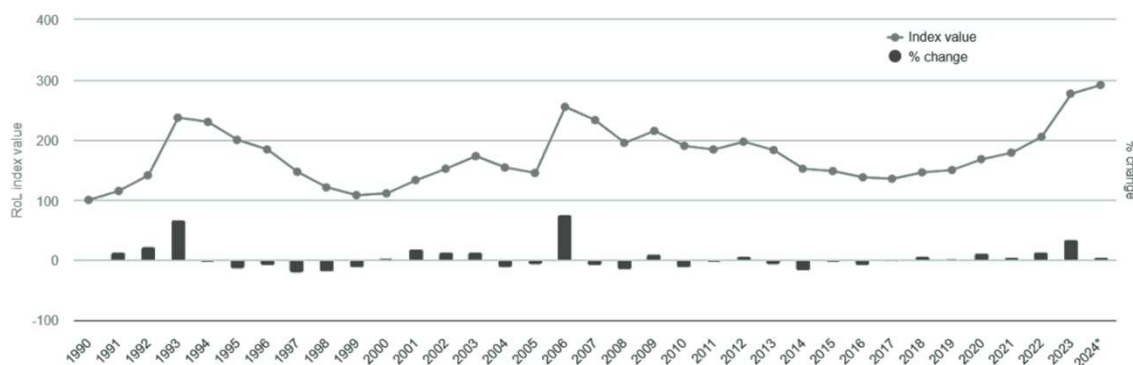
State Of The Reinsurance Market

U.S. PROPERTY CAT MARKET AT THE HARDEST POINT IN RECENT HISTORY

U.S. RISK-ADJUSTED PROPERTY-CATASTROPHE RATE-ON-LINE

KEY METRICS

U.S. Property Catastrophe Rate-On-Line Index



N.B. The Guy Carpenter ROL index is a measure of the change in dollars paid for coverage year on year on a consistent program base.

+5%

year-on-year at
1/1/2024 renewals

+35%

year-on-year at
1/1/2023 renewals

While 1/1/24 renewals were far more stable, further increases suggest rate momentum may continue through to mid-year

“Momentum slowed considerably at the January 2024 renewals, when US property catastrophe reinsurance rates increased by 5.3%, rising further but at a slower pace.”

– Guy Carpenter, January 2024



