

CLIENT DISCUSSION GUIDE

Define the assignment. Agree on the details.

Use this service menu to establish a program scope with Northline. All services are subject to confirmed locations, capacity, requirements, and an agreed quote.

SERVICE	SCOPE TO AGREE	DELIVERABLE
Exterior underwriting inspection	Property type; required elevations and features; visible condition notes; access instructions.	Organized photo record and scope-specific observations, with limitations.
Photo documentation	Required views, condition close-ups, order identification, and image specifications.	Labeled or organized photo file in the agreed format.
Exterior measurements / sketch	Structures to measure; footprint detail; treatment of inaccessible areas and estimates.	Measurement record and footprint sketch when ordered.
Documentation review	Required fields, photo list, sketch requirements, consistency checks, and correction process.	Reviewed file with outstanding items resolved or clearly identified.

Pricing and timing

Quotes are prepared for the agreed scope and service territory. Confirm travel, access attempts, return visits, rush requests, cancellations, correction handling, and payment terms before work begins. Turnaround targets must reflect actual capacity and access requirements.

Current focus

Wisconsin locations are reviewed individually for availability. Illinois is planned expansion. Interior, commercial, farm, high-value, drone, and specialized technical surveys are not included unless Northline separately confirms the necessary scope and capability.

PROPOSED PILOT - DISCUSSION DRAFT

Start small. Review the result.

A limited pilot gives both teams a concrete way to confirm the service, reporting format, and working process before expanding volume. This page is a discussion outline, not an accepted order or contract.

AGREEMENT ITEM	TO CONFIRM WITH THE CLIENT
Pilot batch	Proposed starting point: 10 Wisconsin assignments, subject to capacity and mutual agreement.
Locations and scope	Counties / ZIP codes; property types; required views, observations, and sketches.
Dates	Acceptance date, requested due dates, access expectations, and escalation contact.
Commercial terms	Per-assignment price; travel / return visits; payment terms; cancellation treatment.
Intake and delivery	Approved transfer method; reference format; report layout; recipient and release method.
Acceptance review	Correct property identity; required evidence or explained limits; useful observations; complete review.

Working sequence

- Client and Northline confirm the assignment requirements and commercial terms.
- Northline checks the order details, confirms coverage, and assigns the field representative.
- The representative documents the property and records limitations or missing information.
- Northline reviews the file, resolves corrections, and explicitly authorizes delivery.
- Both teams review the pilot results and agree on any changes before increasing volume.

The current online pilot is an owner-only demonstration with synthetic data. It is not a production client portal. Client access and transfer arrangements must be established before real assignments are submitted.

DEMONSTRATION REPORT - SYNTHETIC EXAMPLE

Property documentation

Demonstration only. No site visit occurred. No real property, policyholder, insurer, or completed Northline assignment is represented.

REFERENCE	NL-DEMO-001
CLIENT	DEMO Regional Partner
PROPERTY	100 DEMO TEST LANE, Madison, WI 53703 (fictional)
SCOPE	Illustrative exterior underwriting documentation
VISIT / INSPECTOR	Not applicable - demonstration record
REPORT STATUS	Example format; not approved for underwriting use

Assignment instructions

Example scope: identify the assignment and property, document four exterior elevations, record relevant visible conditions, and identify access or visibility limitations. The actual program determines required photographs and fields.

Example observation format

ITEM	ILLUSTRATIVE ENTRY
Observation	Example only: a visible gutter section appears detached at a rear corner.
Evidence reference	Rear elevation overview plus a condition close-up would be required to support this observation. No inspection photos are supplied here.
Limitations	Example only: vegetation prevents a complete view of a rear wall segment; concealed conditions remain unverified.
Follow-up	Client reviews the observation and determines any underwriting response. Northline does not decide coverage or eligibility.

Every statement above is fictional and illustrates reporting structure. Replace this demonstration with a permission-cleared, anonymized completed report when available.

DEMONSTRATION REPORT - EVIDENCE AND REVIEW

A complete file makes its limits clear.

This page shows the evidence and review structure. Empty evidence slots are intentional: this is a report example, not proof of completed work.

EVIDENCE ITEM	EXAMPLE REPORTING REQUIREMENT	DEMO STATUS
Front / rear / left / right	Required exterior views connected to the order and property.	Not supplied
Condition detail	Overview and close-up with a specific observation.	Not supplied
Measurements / sketch	Required only when ordered; measured and estimated information distinguished.	Not ordered in this example
Access limitations	Explain areas not observed and information not verified.	Illustrative wording only

Northline review checklist

- Order reference and property identity agree across the file.
- Required evidence is present or each missing item has a clear limitation.
- Observations are supported by the available evidence.
- Measurements and estimates are distinguished; sketches match the ordered scope.
- Unresolved questions and corrections are visible before release.
- The reviewer explicitly approves the report; delivery is a separate action.

Program discussion

Talk with Philip McCutcheon at **228-818-7335** about your required report structure, current Wisconsin locations, expected volume, and pilot scope.