

Pilot Success Criteria & Engagement Charter

Signed by Seek Now and Carrier before pilot kickoff. Lightweight by design — small pilots, minimal data ask.

1. PILOT BASICS

Carrier	<input type="text"/>
Pilot name / code	<input type="text"/>
Pilot kickoff date	<input type="text"/>
Pilot end date	<input type="text"/>
Pilot scope	<input type="text"/>

Scope = peril (W/H typical) + states + number of adjusters + estimated claim count. Keep small to move fast.

2. WHAT WE'RE TRYING TO PROVE (2-3 SENTENCES)

Example: "Validate that FastEstimate reduces inspection-to-payment cycle time and supplemental rate on the carrier's wind/hail claims. Confirm adjuster workflow integration. Set foundation for scaled rollout."

3. SUCCESS METRICS — WHAT WE'LL TRACK

Most metrics are **auto-captured by Seek Now** from FastEstimate + inspection systems — no carrier data lift required. Carrier confirms 3 outcomes (Section 4). At pilot end we score against these to make the expand/hold/terminate call.

METRIC	SOURCE	BASELINE	TARGET AT PILOT END
FastEstimate adoption (% of pilot inspections where adjuster used FE)	SEEK NOW	—	
Adjuster engagement (% of eligible adjusters using FE weekly)	SEEK NOW	—	
Inspection → draft delivery time (avg minutes from inspection complete to FE draft ready)	SEEK NOW	—	
Supplemental rate (% of pilot claims with ≥1 supplemental)	CARRIER		
FNOL → payment cycle time (avg days, end-to-end)	CARRIER		
Adjuster qualitative feedback (Seek Now-run survey, NPS-style)	SEEK NOW	—	
Other (custom carrier metric, optional)			

4. DATA EXCHANGE — WHAT THE CARRIER SHARES (MINIMAL)

For small-scale pilots we keep the carrier data ask **tight** — three fields per closed claim, sent monthly as a simple CSV or shared sheet. No IT integration needed.

WHAT WE ASK FOR	FORMAT	CARRIER AGREES
Per pilot claim: supplemental count (0, 1, 2, etc.)	CSV or shared sheet, monthly	<input type="checkbox"/>
Per pilot claim: final payment date	CSV or shared sheet, monthly	<input type="checkbox"/>
Per pilot claim: was claim reopened post-close? (Y/N)	CSV or shared sheet, monthly	<input type="checkbox"/>
Optional: anonymized \$ paid per claim (if shareable under NDA)	Same monthly CSV	<input type="checkbox"/>
Optional: claims VP / ops director time for 15-min mid-pilot interview	Single scheduled call	<input type="checkbox"/>

5. SEEK NOW AUTO-CAPTURES (NO CARRIER LIFT)

For full transparency — here's what we measure on our side without asking the carrier for anything.

WHAT WE MEASURE	WHAT IT TELLS US
FastEstimate generation time (per claim)	Proves the sub-60-second speed claim
Inspection → FE draft delivery time	Our cycle contribution to the workflow
Field cycle time + data points captured	Seeker network speed + scope completeness
% of FE drafts exported to Xactimate	Usefulness signal — did the adjuster actually use it
Adjuster review time in FE UI	Validates the time-savings claim
Per-adjuster adoption (who's using it, who isn't)	Targeted training opportunity surface
Volume + frequency metrics	Throughput patterns

6. ROLES & CADENCE

ROLE	NAME / CONTACT
Carrier Pilot Champion	
Carrier Claims Ops contact	
Seek Now Account Director	
Seek Now CSM / Implementation	

CADENCE	WHAT HAPPENS
Kickoff	Walk Charter, train adjusters, confirm monthly data exchange
Monthly check-in (30 min)	Adoption signals, blockers, qualitative feedback
Final readout	Single one-pager with all metrics, expand/hold/terminate recommendation

7. DECISION CRITERIA

OUTCOME	WHAT MUST BE TRUE
EXPAND	Suggested: "Adoption ≥60%, supplemental rate trend down, qualitative ≥7/10, no critical workflow issues"
HOLD	Suggested: "Mixed signals; extend 60 days with course corrections"
TERMINATE	Suggested: "Adoption <30% or workflow fundamentally incompatible"

8. SIGN-OFF

FOR THE CARRIER

Name: _____

Title: _____ Date: _____

FOR SEEK NOW

Name: _____

Title: _____ Date: _____