

## Case Study

### Collins & Associates Enhances Risk Control Services with SoterAI

Streamlining Complex Analyses and Boosting  
Client Value: How Collins & Associates Leverages  
AI for Proactive Risk Management



#### The Challenge

Collins & Associates Corporation is a provider of risk management and insurance services, dedicated to helping its diverse clientele navigate complex risk landscapes. Jason Allen, CSP, as the Director of Risk Control Services, leads a team committed to delivering expert guidance and practical solutions.

For Jason and his team, the daily work involves engaging with a wide array of clients across various sectors - from general industry and construction to specialized areas like fuel and gas, fleet operations, and even mine safety. This diversity brings the challenge of staying current with numerous regulations (OSHA, MSHA, DOT) and efficiently analyzing client-specific data to provide tailored advice. The core challenge lay in maximizing time spent on high-value client interaction and strategic risk mitigation, rather than getting bogged down in time-consuming research and administrative tasks.

To meet these challenges head-on, Collins & Associates integrated SoterAI, an advanced AI platform designed to augment the capabilities of risk control professionals. The solution was adopted to help streamline complex analyses, provide quick access to regulatory information, and ultimately allow the team to deliver even more effective service to their policyholders. The platform's ability to quickly process and analyze information became a cornerstone of their daily operations.

#### Transforming Policy and Training Document Review

A significant part of Jason's work involves thoroughly reviewing clients' existing safety policies and training materials to identify gaps and areas for improvement. Traditionally, this was a painstaking process: printing out a client's lengthy safety manual, then printing out the relevant regulations, and meticulously comparing them side-by-side with a highlighter in hand. This manual cross-referencing could consume hours for a single document.

With SoterAI, this critical task underwent a dramatic transformation. Jason described how he could now upload a client's entire safety manual - for instance, a 34-page document - into the SoterAI platform. Within seconds, the AI would analyze the content and pinpoint major areas that were missing or needed attention, providing specific points under each identified gap. This gave them an immediate, clear roadmap for policy enhancement.

The efficiency gained was remarkable. What previously took hours of manual labor could now be accomplished in a matter of seconds. This rapid analysis not only saved Jason and his team considerable administrative time but also ensured a thorough and consistent review, allowing them to quickly move to the more strategic work of helping clients address those identified gaps.



## Streamlining Loss Data Analysis for Actionable Insights

Annually, Collins & Associates provides clients with an analysis of their loss data to identify trends and inform the next year's risk management action plan. This data often arrived in PDF or Excel formats that weren't easy to manipulate, requiring significant effort to sort, filter, and reformat before any meaningful trend analysis could even begin. For clients with extensive loss histories, this data could span 10, 20, or even 30 pages.

SoterAI revolutionized this data analysis workflow. Instead of laborious manual data manipulation, Jason's team could now feed these large and often unwieldy loss run reports directly into the AI platform. SoterAI would then rapidly process the information, performing the analysis in minutes and highlighting key trends, injury types, affected body parts, and locations driving the losses.

This capability was a "game changer," according to Jason. The analysis was not only faster but also more accurate, eliminating the hours previously spent "number crunching." This freed up the risk control team to focus on what truly matters: discussing the identified trends with clients and collaboratively developing targeted action plans to prevent future losses, rather than being buried in spreadsheets.

## Rapidly Navigating Unfamiliar Industries and Regulations

The diverse clientele of Collins & Associates means Jason and his team frequently encounter industries with specialized regulatory landscapes that might be outside their primary expertise, such as MSHA (Mine Safety and Health Administration) or specific DOT (Department of Transportation) rules. As a generalist, knowing enough about every specific regulation is a tall order, and getting up to speed for a site visit in an unfamiliar sector traditionally required extensive research.

SoterAI provided a powerful solution for this challenge. Jason shared an example of preparing for a hazard identification audit at a site regulated by MSHA, an area he hadn't encountered before. He used SoterAI to help create a comprehensive checklist, prompting the AI with questions about key MSHA requirements. Through a brief back-and-forth interaction, SoterAI generated a detailed three to four-page checklist specifically tailored for the MSHA site audit.

This entire process of creating a robust, site-specific audit tool took less than 15-30 minutes with SoterAI, a task that Jason estimated would have taken him hours to research and compile on his own. This ability to quickly generate customized, regulation-aware tools allows the team to confidently and competently serve clients in a wider range of industries, effectively leveling the playing field regardless of prior specific experience in a niche sector.

**"SoterAI is a game-changer for the insurance world, fundamentally reshaping how we approach risk control"**



**Jason Allen, CSP,**  
Director of Risk Control Services  
at Collins & Associates Corporation



## Overall Impact: A New Standard in Risk Control Services

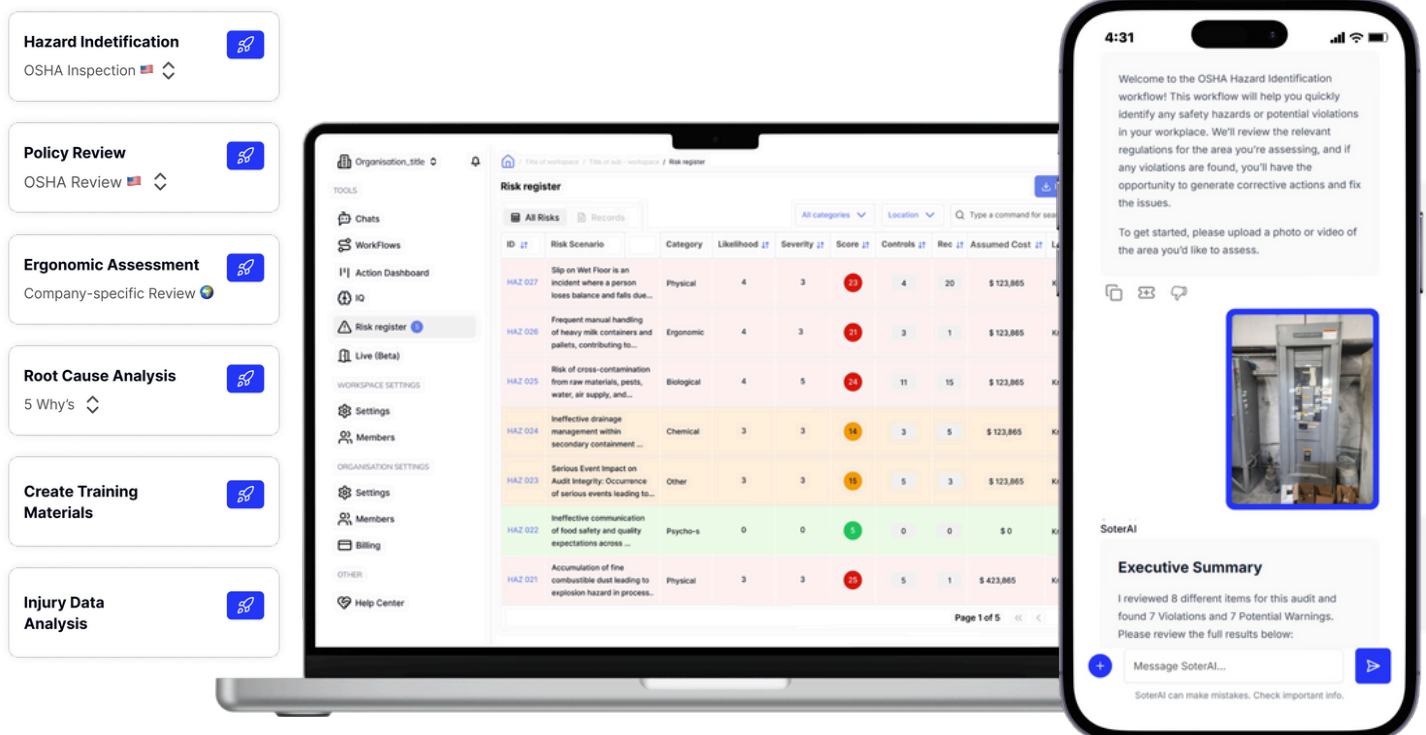
The integration of SoterAI has brought significant, tangible benefits to Collins & Associates' risk control services.

- **Massive Time Savings:** Across multiple workflows - from policy reviews that now take seconds instead of hours, to rapid loss data analysis and quick generation of audit checklists - administrative time has been drastically reduced. Jason noted that report writing time, a common bottleneck, was generally cut by 50-60% based on broader SoterAI user experiences.
- **Increased Client-Facing Value:** By minimizing time spent on administrative tasks, the risk control team can dedicate more hours to being on-site with clients, engaging in collaborative action planning, and helping implement risk reduction strategies directly.
- **Greater Accuracy and Expertise:** SoterAI empowers the team to quickly become knowledgeable and effective in diverse client industries and regulatory environments, reducing the potential for human error in complex manual processes and enhancing their versatility and the value they provide.

Jason Allen describes SoterAI as a "game changer" for their operations. By automating and streamlining some of the most time-consuming aspects of risk control, SoterAI helps the Collins & Associates team operate more efficiently, deliver deeper insights, and ultimately foster stronger, more proactive safety partnerships with their clients. It allows them to focus on strategic advice and hands-on support, making workplaces safer and more resilient.

## About Soter

Soter, the global leader in AI solutions since 2017, revolutionizes risk management, workplace safety, and compliance for industrial and insurance sectors.



**Hazard Identification**  
OSHA Inspection

**Policy Review**  
OSHA Review

**Ergonomic Assessment**  
Company-specific Review

**Root Cause Analysis**  
5 Why's

**Create Training Materials**

**Injury Data Analysis**

ID	Risk Scenario	Category	Likelihood	Severity	Score	Controls	Rec	Assumed Cost
HAZ 027	Slip on Wet Floor is an incident where a person loses balance and falls due...	Physical	4	3	12	4	20	\$ 123,865
HAZ 028	Frequent manual handling of heavy milk containers and pallets, contributing to...	Ergonomic	4	3	12	3	1	\$ 123,865
HAZ 025	Risk of cross-contamination from raw materials, pests, water, air supply, and...	Biological	4	5	20	11	15	\$ 123,865
HAZ 024	Ineffective drainage management within secondary containment...	Chemical	3	3	10	3	5	\$ 123,865
HAZ 023	Serious Event Impact on Audit Integrity: Occurrence of serious events leading to...	Other	3	3	10	5	3	\$ 123,865
HAZ 022	Ineffective communication of food safety and quality expectations across...	Psycho-s	0	0	0	0	0	\$ 0
HAZ 021	Accumulation of fine combustible dust leading to explosion hazard in process...	Physical	3	3	10	5	1	\$ 423,865

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Welcome to the OSHA Hazard Identification workflow! This workflow will help you quickly identify any safety hazards or potential violations in your workplace. We'll review the relevant regulations for the area you're assessing, and if any violations are found, you'll have the opportunity to generate corrective actions and fix the issues.

To get started, please upload a photo or video of the area you'd like to assess.

**SoterAI**

**Executive Summary**

I reviewed 8 different items for this audit and found 7 Violations and 7 Potential Warnings. Please review the full results below:

Message SoterAI...

SoterAI can make mistakes. Check important info.