

REVENUE OPPORTUNITIES

QUOTE ASSOCIATE



Real-Time Quote Conversion

THE HIDDEN COST OF INEFFICIENCY

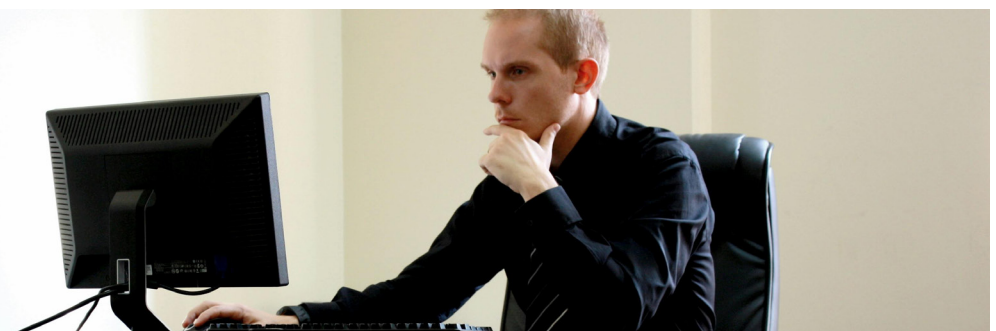
A quote delayed is a quote denied. Friction at the point of sale—whether an unanswered question or a lagging portal—causes prospects and agents to abandon quotes. Failing to provide immediate resolution directly results in lost conversion.

YOUR DIGITAL WORKFORCE

The Quote Associate: Accelerate your quote conversion. We move beyond defensive efficiency measures to deploy outcome-driven AI Associates that handle transactional work end-to-end, securing the revenue right at the point of decision.

AGENTIC BUSINESS RESULTS (ABR) DELIVERED

- **Frictionless Sales:** Executes real-time, point-of-sale quoting for both agents and direct consumers.
- **Instant Q&A:** Resolves complex customer and agent questions dynamically during the quoting process to prevent abandonment.
- **Maximized Conversion:** Translates increased quoting capacity directly into bound revenue.



PROVEN ARCHITECTURE, ABSOLUTE CONTROL

COMPLIANCE BY DESIGN

The Human-in-the-loop Differentiator:

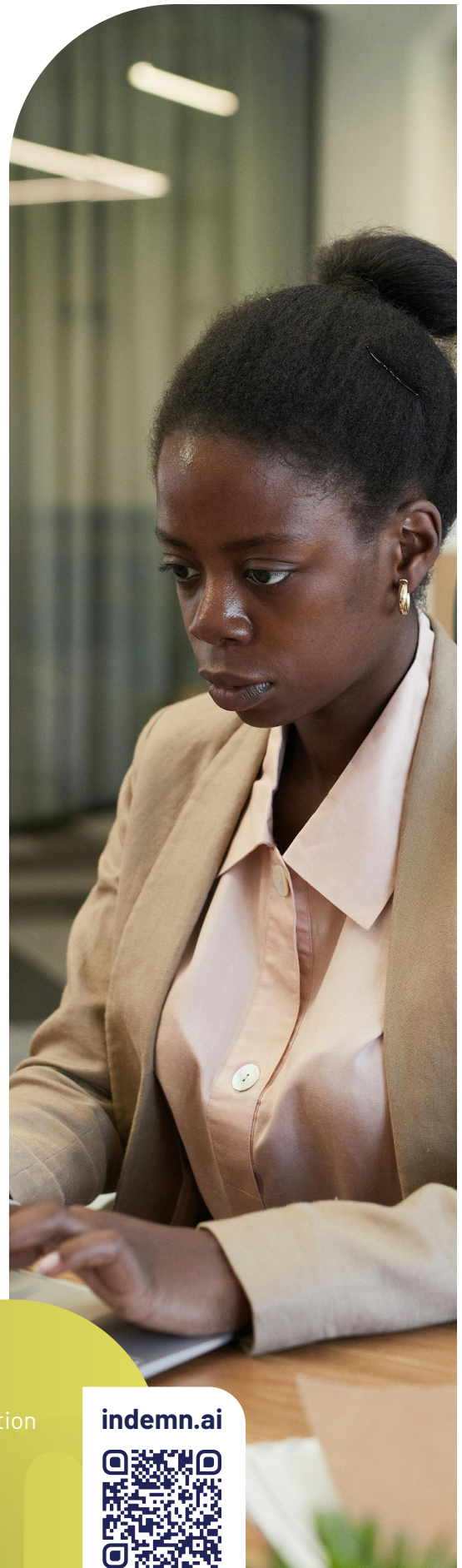
Our human-in-the-loop architecture actively enforces moment-by-moment integrity and NAIC AI Model Bulletin compliance. When ambiguous, the AI queues a response for human review, providing a transparent trail of decision-making.

INCONTROVERTIBLE MARKET VALIDATION

We approach the market with incontrovertible market validation: the successful creation, scaling, and sale of our fully digital MGA, Eventuguard. During its operation, our AI Associates successfully completed over 90% of policy sales transactions from quote to bind entirely without human intervention. This divestiture structurally de-risks our offering for institutional partners.

TECHNICAL VALIDATORS

- **Rapid Time-to-Value:** Production-ready in ~60 days.
- **Insurance-Native Architecture:** Understands binding authority and surplus lines out of the box.
- **API-First Integration:** Integrates with AMS/PAS (Guidewire, Vertafore) without breaking stacks.
- **No-Code Control:** Strategy Studio empowers operations teams to update rules without IT support.



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