

WORKFLOW EFFICIENCY

INTAKE ASSOCIATE FOR AMS

Maintain Perfect AMS Data Hygiene



THE HIDDEN COST OF INEFFICIENCY

Your Agency Management System (AMS) is only as valuable as the data inside it. However, relying on overburdened human staff to manually update records leads to inconsistent data hygiene, missing documentation, and compliance risks that threaten the stability of the agency.

YOUR DIGITAL WORKFORCE

The Intake Associate for AMS: We replace manual tools with an insurance-native digital workforce. The Intake Associate for AMS operates continuously in the background, listening to system events and communications to keep your core systems pristine without requiring a single keystroke from your staff.

AGENTIC BUSINESS RESULTS (ABR) DELIVERED

- **Automated Data Entry:** Automatically updates your Agency Management System (AMS) by extracting key data points from inbound documents and emails.
- **Flawless Hygiene:** Eliminates the need for manual data entry and ensures your system of record is always accurate and fully auditable.
- **Liberated Staff:** Frees your producers from the screen, ensuring revenue scales independently of headcount limitations.



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 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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