

WORKFLOW EFFICIENCY

INTAKE ASSOCIATE

Intelligent Submission Extraction



THE HIDDEN COST OF INEFFICIENCY

Your underwriting teams spend up to 70% of their time simply doing data entry from unstructured emails, SOVs, and loss runs. Relying on highly compensated human labor for initial data extraction caps your operational output and slows your speed-to-market.

YOUR DIGITAL WORKFORCE

The Intake Associate: Deploy an AI Associate to serve as an Automated Submission Triage & Data Extraction capability. The Intake Associate seamlessly translates unstructured inbound chaos into clean, actionable data.

AGENTIC BUSINESS RESULTS (ABR) DELIVERED

- **Automated Intake:** Handles the automated intake and sorting of complex emails and unstructured documents (SOVs, loss runs).
- **System Population:** Executes the seamless extraction of key data points, directly populating your carrier underwriting systems.
- **Appetite Triage:** Instantly triages submissions based on complexity and appetite, elevating human staff to advisory and approval roles.



PROVEN ARCHITECTURE, ABSOLUTE CONTROL

COMPLIANCE BY DESIGN

The Human-in-the-loop Differentiator:

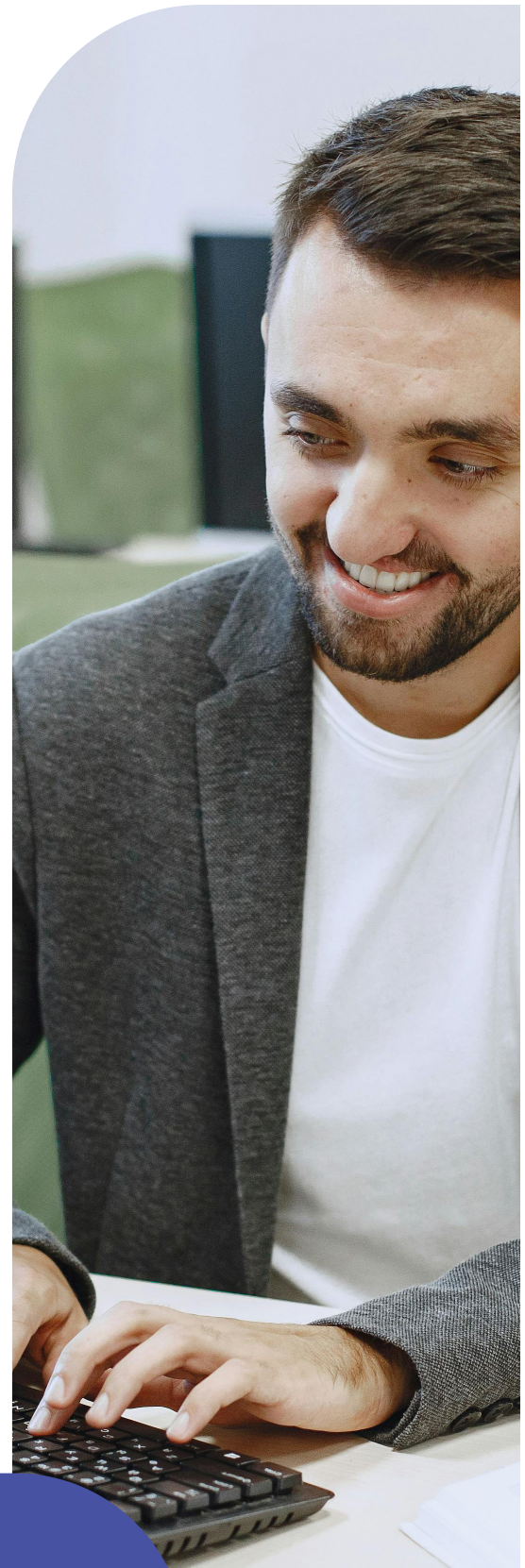
Our human-in-the-loop architecture actively enforces moment-by-moment integrity and NAIC AI Model Bulletin compliance. When ambiguous, the AI queues a response for human review, providing a transparent trail of decision-making.

INCONTROVERTIBLE MARKET VALIDATION

We approach the market with incontrovertible market validation: the successful creation, scaling, and sale of our fully digital MGA, Eventuguard, to Jeweler's Mutual Insurance. 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.



Your Growth Partner in Insurance Distribution

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