



Steering Innovation and Productivity in Insurance with Gen AI and Automation

Automation Technology for Secure, Faster and Self-Service Processes

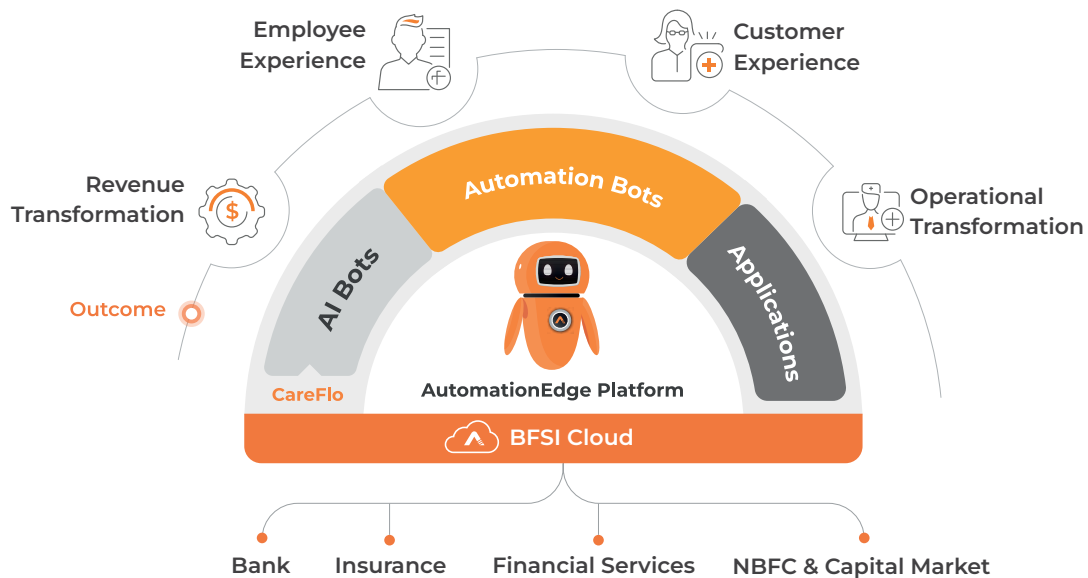
Gen AI and Automation in Insurance

Insurance companies are vigorously immersed with back-office forms as most of the documentation process is paper-based. Insurers regularly handle an exceptionally high volume of business processes like claims-processing and underwriting as well as providing policy quotes with manual steps which creates a significant delays in time and also affects customer satisfaction, business conversion and profitability.

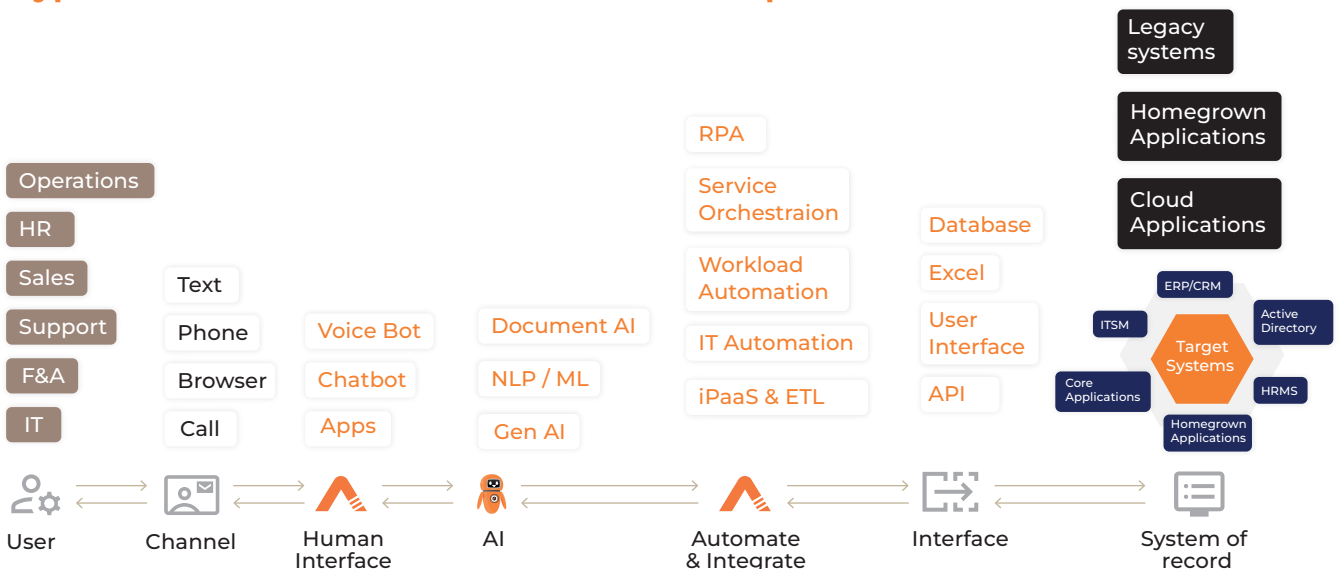


AutomationEdge for Enterprise-wide Automation

AutomationEdge Universal Automation Platform can analyze large volumes of data and deal with exceptions and translate them into insights to act. AutomationEdge can go beyond just cost reduction and efficiency by adding significant value to businesses with personalized and a higher degree of self-service.



Hyperautomation and Service Orchestration platform



Automation Opportunities in Insurance

Sales and New Business	Policy Servicing	Document Processing	Claims Payout	Support Functions
<ul style="list-style-type: none"> » RFP » Quote Issuance » Proposal » Creation » Underwriting » Policy Issuance » Actuarial 	<ul style="list-style-type: none"> » Renewal » Endorsement » Customer Connect » Payment Processing » Receipting » Surrender/ Cancellation » Reconciliation 	<ul style="list-style-type: none"> » KYC Documents » RFP Details » Physician's Statements » Claim Forms » Medical Reports » Lab Reports » Policy Certificates » Binders 	<ul style="list-style-type: none"> » Death Claims » Maturity Claims » Claims Accounting » Claims Payouts » Maturity Payouts 	<ul style="list-style-type: none"> » Accounts » HR » Audit » IT Operations » Legal » Employee Support

How AI and Automation Help Re-imagine Business Processes

Extract Data	Validate / Analyze	Record	Calculate / Decide	Orchestrate & Manage	Transport / Communicate	Reports
<ul style="list-style-type: none"> » Data Search & Retrieval (Internal & External Secure Site access) » Data collation & aggregation/ consolidation 	<ul style="list-style-type: none"> » Data mapping & Verification/ Validation » Error pattern analysis and Identification » Unstructured data collation & analysis 	<ul style="list-style-type: none"> » Recipient Data entry and logging » Multiple Interface Data entry » Archive metadata & Information 	<ul style="list-style-type: none"> » Automated Calculations » Rule based decision making » Rule based analysis » Run macros /Models 	<ul style="list-style-type: none"> » Data review » Task allocation 	<ul style="list-style-type: none"> » Data migration/ Upload/ Download » Automated Notification /Alerts 	<ul style="list-style-type: none"> » Automated Reports & Workflow » Schedule based processing & reporting

Intelligent Automation Use Cases

MIS Report Generation Automation	Automated Reconciliation	Intelligent Document Processing
<ul style="list-style-type: none"> » Collect Source Data / Files » File Data Merge » Standardize » Normalize » Rebuild 	<ul style="list-style-type: none"> » Configurable rules / Logics » Sort & Filter » Validation » Consolidation » Formula » Function » Group/ Ungroup 	<ul style="list-style-type: none"> » Collect data from source » Split page for multi page document » Image processing, cropping, alignment, tilt & orientation correction » Document classification
<ul style="list-style-type: none"> » Pivot » Deduplication » Organizing » Grouping » Dashboard » Report Distribution 	<ul style="list-style-type: none"> » Reporting » Suggest corrective action » Perform corrective action at source data 	<ul style="list-style-type: none"> » Key value extraction » Data validation and standardization » Visual inspection, correction & validation approval » Data export in Excel, CSV, JSON, XML

Gen AI and Automation Solutions for Insurance

Insurance Claims Processing (Life/General/Health)

Streamline Claims, Enhance Customer Experience

AutomationEdge's end-to-end claims processing solution automates every step, from claim intimation to payout.

Key Features:

- » Omnichannel claim intimation (Email, SMS, WhatsApp)
- » Automated document collection, verification, and generation
- » Fraud detection with anomaly and document verification
- » Integration with external databases (e.g., IIB)
- » Business dashboards for real-time claims tracking

Benefits:

Faster claims processing, enhanced customer satisfaction, and reduced manual effort.

Cheque Data Extraction for CTS Clearing

Fast, Accurate Cheque Processing

Automate cheque data extraction and validation for seamless clearing processes

Key Features:

- » Extracts handwritten and digital data with 95% accuracy
- » Multilingual data extraction and business rule validations
- » Processes cheques in 4-5 seconds with signature validation

Benefits:

Optimized costs, faster processing, and compliance-ready deployment.

Email Responder Automation for CRM/Call Centers

AI-Powered Email Management

Revolutionize customer service with Gen AI-powered email automation.

Key Features:

- » Understands complex, unstructured emails using LLMs
- » Automates workflow triggering and retrieves answers from knowledge bases
- » Provides personalized, contextual responses based on customer sentiment
- » Seamlessly integrates with CRM and ticketing systems

Benefits:

Faster response times, improved customer engagement, and reduced agent workload.

Aadhar Card Redacting/Masking

Secure and Compliant Aadhar Processing

Automate the redaction of Aadhar numbers for KYC compliance.

Key Features:

- » Handles all image formats and PDFs with 90-95% accuracy
- » Intelligent ML-based document classification and redaction
- » Processes high volumes quickly with noise reduction and image enhancement

Benefits:

Faster compliance, reduced manual effort, and improved accuracy.

KYC Data Extraction

Simplify KYC Processes with Automation

Automate KYC data extraction, validation, and redaction for seamless onboarding.

Key Features:

- » QR code decryption for Aadhar and classification of KYC documents (PAN, Passport, etc.)
- » Online validation with UIDAI and Income Tax databases
- » CKYC generation, update, and validation
- » Handles rotated, photocopied, or multi-page documents with noise reduction

Benefits:

Faster KYC processing, improved accuracy, and compliance-ready solutions.

WhatsApp Bot for Employee & Customer Support

Instant Support, Anytime, Anywhere

AutomationEdge's AI-powered WhatsApp Bot simplifies daily queries for employees and customers, saving time and boosting productivity.

Key Features:

- » **Employee Support:** Handles queries like attendance, salary slips, leave balance, and more.
- » **Customer Support:** Provides instant information on insurance products, new policy details, and claim status.
- » Seamless integration with multiple systems (HRMS, CRM, Policy Management Systems).
- » AI-driven personalized responses for faster query resolution.

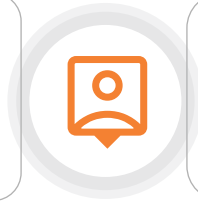
Benefits:

Faster KYC processing, improved accuracy, and compliance-ready solutions.

Challenges

Manual Efforts in supporting employees in IT, HR, Finance

Impact on employee productivity, satisfaction, attrition



Employee Experience Suffers due to lack of Self service

Different Portal for HR, IT, Finance, Admin Queries

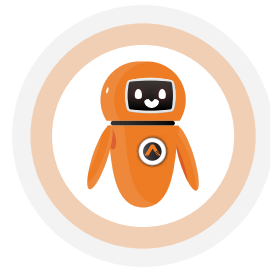
AI and Automation for Employee support

Systems of Engagement



Continuous Client Experience

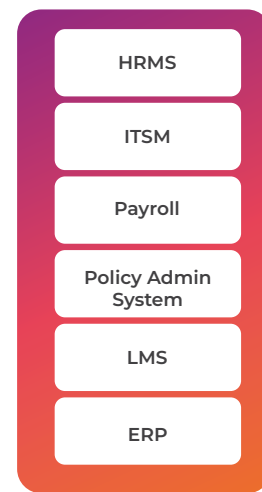
Engagement Channels



AI and Automation Cloud

E2=Efficiency + Experience

System of Record



This is how your Staff will see you

This is where your disconnected system are

Gen AI employee assistant

A Gen AI employee assistant that reduce IT, HR, Finance tickets



“

AutomationEdge has helped us reduce 30% - 40% time of HR team by automating employee queries through WhatsApp, automation and integration with system.

Santanu Mukherjee

CHRO, Bajaj Allianz Life

“

AutomationEdge helped us in creating a center of robotic excellence for the payout and customer-centric process with approx 350 bots and enabled us to achieve our automation goals.

Sarathy Elayath

Associate vice President, HDFC Life

250+ Global Organizations Trust Us

Awards & Recognitions



Niche Player

Gartner

Magic Quadrant
for RPA 2019

Executive Zone

**zinnov
ZONES**

IT Automation 2024

Major Contender

Everest Group
From insight to action.

Peak Matrix for
RPA 2024



Scan to get the Experience WhatsApp Bot



For All Queries:
info@automationedge.com
www.automationedge.com



Experience WhatsApp Bot

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