



What is Insurance Workflow Automation?

In the insurance industry, repetitive tasks such as data extraction, verification, quote creation, and policy review require extensive manual effort and time. Manually performing these processes leads to inefficiencies, delays, and high operating costs. Workflow automation in insurance can autonomously handle tasks like insurance quote generation, data validation, application review, and many others, allowing for faster customer response. McKinsey estimates that automation can boost productivity across insurers by up to 25% through full-time position consolidation over the next decade, particularly in operations and administrative roles.

Growing Challenges for Insurance Industry

Only **25%** of submission insurance company receive is turning into written policies.

Around **30-40%** of underwriters time is spent on administrative workflow like data extraction, analysis, verification and risk assessment.

As insurance cost fraud reaching **\$6 billion** annually, risk assessment is crucial factor that need to be taken care by insurers.

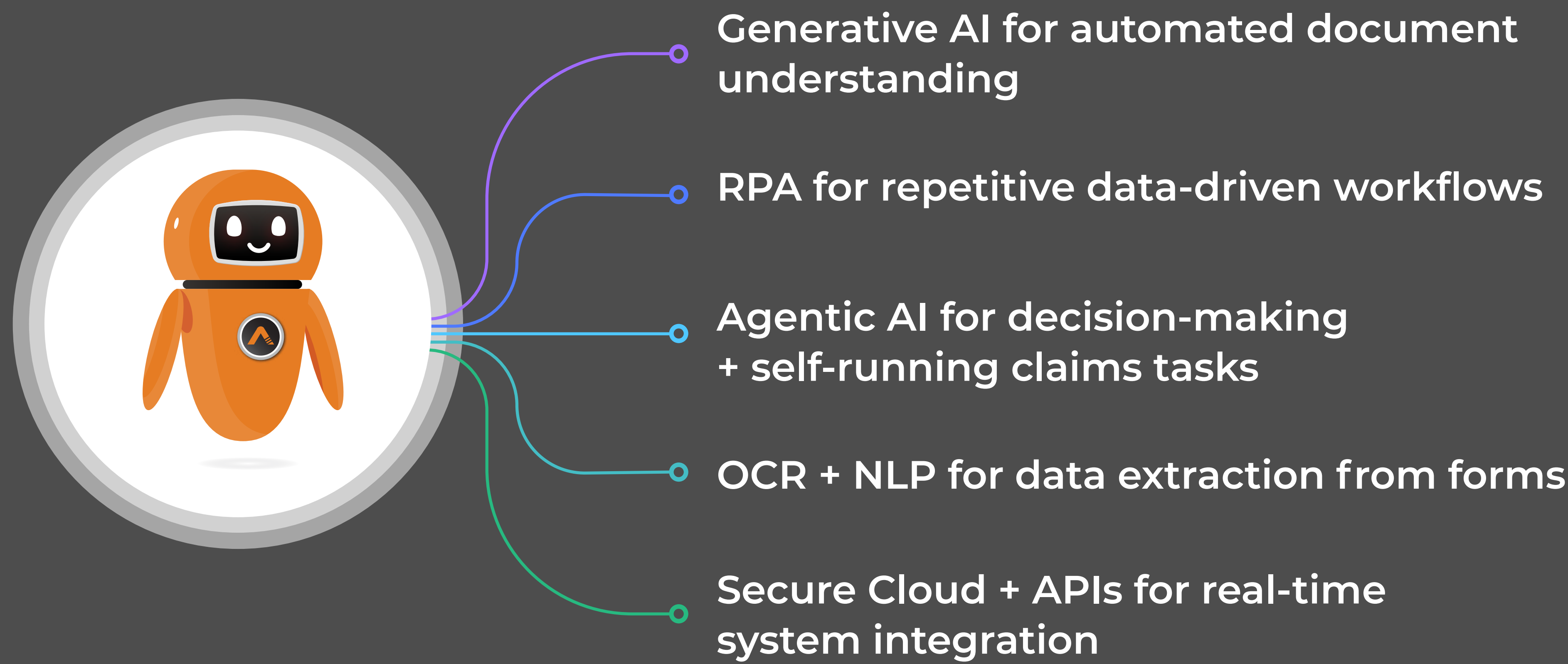
Around 41% of insurers are likely to change their insurers due to lack of digital capabilities.

How Agentic AI Elevates Insurance Workflow Automation

Suggests next-best actions to speed resolution



Technologies Transforming Insurance Workflows



Benefits of Insurance Workflow Automation

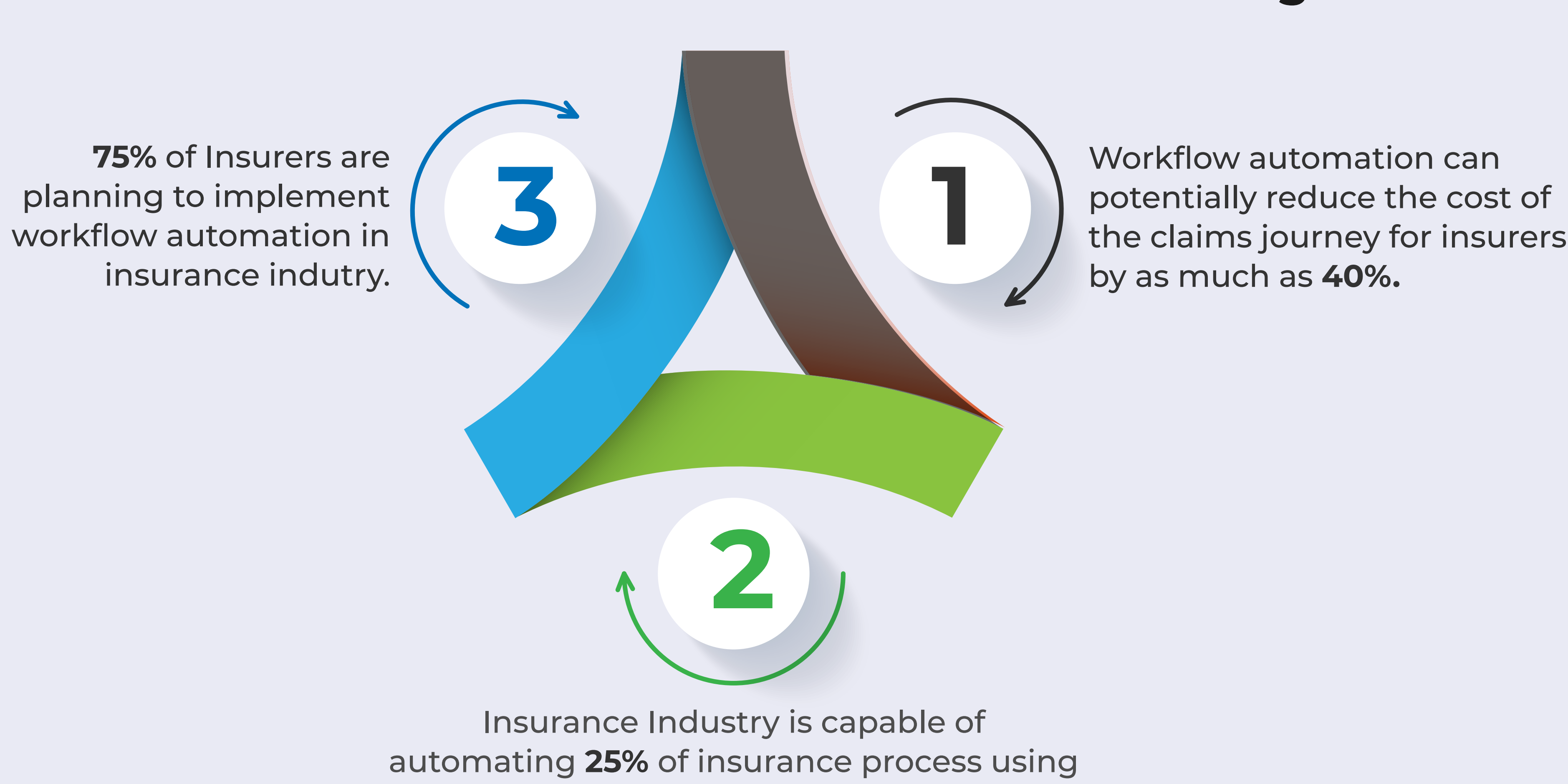


Tips for Leadership in Insurance



- » Prioritize automation in high-volume, rules-based workflows
- » Start with RPA + AI; evolve to Agentic AI for autonomy
- » Use Agentic AI for predictive decisioning rather than reactive ticket handling
- » Deploy autonomous agents to proactively identify risks and trigger actions
- » Enable self-learning workflows that continuously optimize claims operations

Insurance Workflow Automation is Growing



Top 5 Insurance Workflow Automation Examples

Underwriting

Underwriters handle high volume data to assess risk. Workflow automation in underwriting process can handle tasks like-

1. Data Intake
2. Risk Assessment
3. Claims Tracking
4. Compliance Check

Customer Service

Automation in Insurance Customer Service can handle workflows like-

1. Ticket Routing
2. Data Collection
3. Status Update
4. Data Storage
5. Feedback

Customer Onboarding

Automated Workflow for customer onboarding are-

1. Document Submission
2. Data Extraction
4. Account Creation
5. Personalize Message

Application Processing

Insurer receives various applications like claims, policy issuance and many others. Example of automated Workflow automation for policy application are -

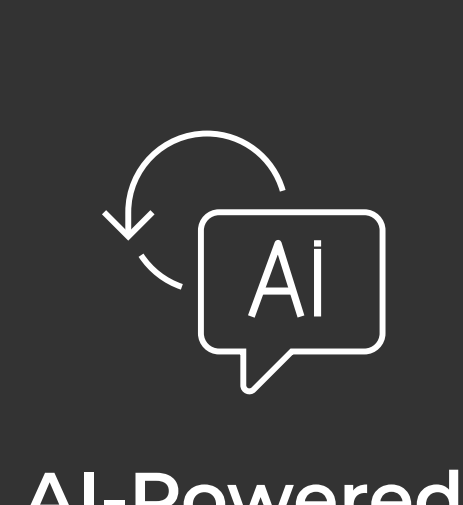
1. Application Review
2. Data Verification
3. Compliance Check
4. Renewal Notices

Quote Processing

Automating insurance plan quotes involves managing several workflows, especially when customers demand instant access. Automated workflow for quote processing are-

1. Quote Creation
2. Contract Approval
3. Customer Onboarding
4. Follow Up
5. Renewal Reminder

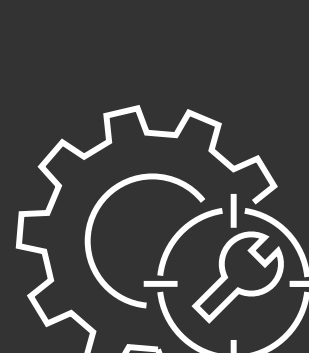
Why Choose AutomationEdge?



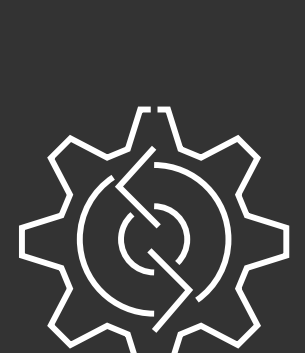
AI-Powered Chatbot



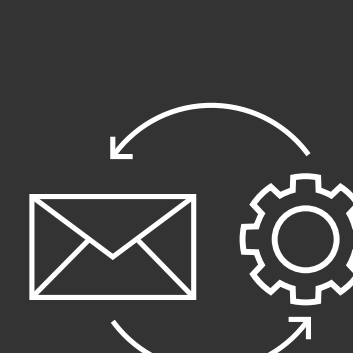
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Low Code/No Code Platform



Intelligent Document Processing Solution



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