FULCRUM DIGITAL **FD**

InsurTech Accelerators: Private AI Agent Bundles

A comprehensive suite of intelligent tools designed to transform your insurance operations, enhance customer experiences, and drive ROI. All bundles built on the FD RYZE platform live on your private, secure servers.

Presented by Fulcrum Digital

Complete Your Insurance Solution Ecosystem

Digital Transformation

Modernize legacy systems and processes through digital transformation initiatives

Product Engineering

Create innovative insurance products through expert software engineering

Quality Assurance

Ensure software reliability through comprehensive testing procedures

Data & Analytics

Transform raw data into actionable business intelligence for better decision-making

Cloud Services

Leverage cloud infrastructure for greater scalability and accessibility

Consulting Services

Expert guidance on technology strategy and implementation

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Bundle 1: Claims Acceleration Suite

Use Case

Property & Casualty insurers struggling with slow claims processing, high operational costs, and customer dissatisfaction due to lengthy settlement times

Designed For

- Claims Managers & COOs
- Customer Experience Directors
- Claims Adjusters

Why This Bundle?

Create an end-to-end claims optimization solution that reduces settlement time by up to 70% while improving accuracy and customer satisfaction

42%

Cost Reduction

Lower processing costs per claim

65%

Faster Resolution

Reduction in claim cycle time

30%

Higher Satisfaction

Increase in NPS scores

1

InsuranceClaim Assistant Agent

Automates validation and processing, reducing errors and settlement times

2

Claim Intake Sub Agent

Streamlines data collection and verification for frictionless intake

3

Intelligent Claims Summarization Agent

Automates document processing and provides concise claim summaries

4

Doc Extract Agent

Extracts structured data from claims documents for faster processing

Bundle 2: Risk Intelligence Platform

ⓘ Create a comprehensive risk assessment ecosystem that combines historical analysis, predictive modeling, and behavioral insights for superior risk management

18%
Loss Ratio
Improvement in combined ratio

3.2x
ROI
Return on technology investment

24%
Fraud Reduction
Decrease in fraudulent claims

Use Case
Insurers seeking to improve underwriting accuracy, reduce loss ratios, and proactively manage portfolio risk in volatile market conditions

Designed For
• Underwriters
• Risk Managers
• Actuaries
• Portfolio Managers

Claim Prediction Forecasting Agent
Forecasts claim probabilities to optimize reserves and risk management

Policy Behavior Analyst Agent
Analyzes policyholder behavior to detect patterns and anomalies

Risk Mitigation Advisor Agent
Recommends targeted strategies to reduce exposure and losses

Underwriting DataHub Agent
Consolidates data sources for improved underwriting decisions

Bundle 3: Customer Retention & Growth

Use Case

Insurance providers facing customer attrition challenges, low cross-sell/upsell performance, and increasing customer acquisition costs

Designed For

- Marketing Directors
- Sales Leaders
- Customer Success Managers,
- Product Owners

Why This Bundle?

Create a proactive customer management platform that identifies at-risk relationships, optimizes retention strategies, and maximizes customer lifetime value

35%
Retention Lift
Improvement in customer retention

28%
Cross-Sell
Increase in cross-sell revenue

20%
CLV Boost
Additional customer lifetime value

1

Customer Churn Forecasting Agent
Predicts at-risk customers for targeted retention campaigns

2

Personalized Policy Advisor Agent
Recommends tailored insurance products based on customer profiles

3

Policy Match Agent
Ensures optimal coverage alignment with individual customer needs

4

Premium Price Forecasting Agent
Predicts pricing trends to support competitive positioning

Bundle 4: Healthcare Insurance Suite

1	2	3

Use Case

Healthcare insurers and providers struggling with policy administration complexity, compliance challenges, and inefficient claims processing

Designed For

- Healthcare Administrators
- Medical Directors
- Compliance Officers
- Claims Specialists

Why This Bundle?

Create an integrated healthcare insurance platform that streamlines operations, ensures regulatory compliance, and improves provider-payer relationships

52%
Processing Speed
Faster claims processing time

67%
Admin Reduction
Less administrative overhead

99.8%
Compliance
Regulatory compliance rate

HealthCare Policy Search Agent
Instantly retrieves and compares healthcare policies for informed decisions

Policy Insight Agent
Extracts and clarifies key policy details to improve understanding

Claims Summarization Intelligence Engine Agent
Generates concise summaries of healthcare claims for faster review

WC Claims Doc Extractor Agent
Specialized extraction for all workers' compensation claims documentation

Bundle 5: Executive Intelligence Center

87%
Faster Decisions
Reduction in decision time

23%
Cost Savings
Operational efficiency gains

4.5x
Strategy ROI
Return on strategic initiatives

Use Case
Insurance executives and leaders needing comprehensive business intelligence, performance metrics, and strategic insights for data-driven decision making

Designed For
- C-Suite Executives
- Board Members
- Regional Directors
- Strategic Planning Teams

Why This Bundle?
Create a centralized intelligence hub that delivers real-time performance visibility, predictive analytics, and competitive insights to drive strategic decisions

1

Management Report Query Agent
Retrieves historical reports and metrics for informed decision-making

2

Claim History Search Agent
Provides detailed claim histories to support trend analysis

3

Premium Price Forecasting Agent
Projects pricing trends based on market conditions and risk profiles

4

Customer Churn Prediction Engine Agent
Identifies retention risks for strategic customer management

Bundle 6: Specialty Insurance Innovation Hub

32%
Market Growth
Expansion in target segments

41%
Process Efficiency
Operational improvement

3.8x
Faster Delivery
For custom insurance plans

CECOP Pricing & Recommendation Agent
Specialized for optometry with competitive pricing strategies

Policy Match Agent
Customized for specialty insurance product recommendations

Claim Prediction Forecasting Agent
Tailored predictive modeling for niche insurance sectors

Service Document Data Extractor Agent
Specialized extraction for specialty insurance documentation

Use Case
Specialty insurers (optometry, pet insurance, etc.) seeking tailored technology solutions for unique market segments and specialized business requirements

Designed For
- Product Managers
- Line of Business Leaders
- Niche Market Specialists

Why This Bundle?
Create a customizable platform that addresses the unique challenges of specialty insurance markets with domain-specific intelligence and analytics

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Implementation & ROI Timeline

Month 1-2: Foundation

- Technology assessment
- Solution architecture design
- Data integration planning

ROI: Legacy system cost reduction begins (5-10%)

Month 5-8: Optimization

- Workflow refinement
- Performance tuning
- Expanded adoption

ROI: Claims processing time reduced (30-50%)

1   **2**   **3**   **4**

Month 3-4: Implementation

- Core AI agents deployment
- User training and adoption
- Process integration

ROI: Operational efficiency gains (15-25%)

Month 9-12: Transformation

- Advanced analytics activation
- End-to-end automation
- Continuous improvement

ROI: Full solution benefits realized (100-300% ROI)

Transform Your Insurance Operations Today

Measurable ROI

Average client results within 12 months:

- 42% reduction in operational costs
- 65% faster claims processing
- 35% improvement in customer retention
- 28% increase in cross-sell revenue

Implementation Excellence

Our proven approach ensures success:

- Tailored solutions for your specific needs
- Seamless integration with existing systems
- Comprehensive training and adoption support
- Ongoing optimization and enhancement

Next Steps

- Schedule a solution demo
- Complete a free ROI assessment
- Develop your customized implementation roadmap
- Begin your digital transformation journey

"Fulcrum Digital's AI insurance solutions have transformed our operations, delivering ROI that exceeded our expectations within the first six months."

— Chief Digital Officer, Leading P&C Insurer