

PROCESS HEATMAP: INSURANCE BROKING

Highest Automation Potential



● Attended Robot Potential

Sales & distribution	Quote & new business	Renewal & billing	Servicing	Risk advisory	Operations
Lead generation ●	Know you customers (KYC) ●	Invoice management ●	Claim intimation ●	Actuarial assessment ●	Account onboarding
Requirement management	Need analysis	Renewal notices ●	Clam/policy enquiry ●	Risk assessment ●	Activation/termination ●
Appointment management (sales calls/referrals) ●	Coverage and eligibility check ●	Recovery management	Claim settlement ●	Risk modelling	License management ●
State fillings ●	Personalized recommendation ●	Collection management ●	Renewal processing	Treaty placement	Recruitment
Expense submission	Quote comparison ●	Commission management ●	Policy changes/endorsements ●	Investment consulting ●	Training
Dashboards/ reporting ●	New business submission	Reconciliation ●	Document handling ●	Market analysis	Data aggregation ●