

Insurance that works for people

AegisNow for Life and P&C operations,
supported by Genellipse's data, AI and
modernization expertise.

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AegisNow and the Genellipse insurance solutions portfolio

The service and claims specialist

A customer needs an answer. The specialist needs a reliable record and the authority to act.

Today's friction

Switching systems, chasing documents and repeating checks.

The better workflow

One case context, visible exceptions and a clear next step.

Illustrative role and AI-generated persona. Not a customer or testimonial.

Two business models, one transformation discipline

The workflow must reflect the risk, contract and customer need.

01

Life insurance

Evidence-heavy underwriting and long-lived policy servicing.

02

P&C insurance

Submission triage, changing exposures and loss response.

03

Shared foundation

Reliable data, controlled decisions and measurable service.

A complete file for the underwriter

Organize application evidence before a person makes the underwriting decision.

01

Intake

Check application completeness and consent requirements.

02

Evidence

Assemble permitted sources with provenance.

03

Referral

Route unusual cases to authorized underwriters.

Less effort between submission and decision

A structured submission lets the underwriter spend time on the actual risk.

01

Normalize

Organize broker documents and exposure schedules.

02

Check appetite

Compare the submission with approved business rules.

03

Prepare the decision

Show missing information, sources and referral reasons.

Servicing with a clear transaction state

Policy changes should finish with an acknowledged result, not an uncertain screen.

01

Prepare

Validate the requested change and authority.

02

Execute

Use the supported policy-system interface.

03

Reconcile

Show confirmed, pending or rejected outcomes.

Long-lived policies need consistent context

Help service teams handle life events with accurate policy and customer information.

01

Policy context

Current status, ownership
and permitted changes.

02

Customer continuity

Prior contacts, documents
and outstanding requests.

03

Specialist handoff

Clear handling for sensitive or
exceptional cases.

A stronger claim file starts at first notice

AegisNow can connect intake, evidence and claims-authority controls.

Capture the loss

Organize first notice and supporting documents.

Prepare review and record the decision

Surface coverage questions and missing evidence. Retain reviewer rationale and payment authority.



Compassionate service with disciplined review

Beneficiaries need clarity at a difficult time.

Support the claimant

Give a clear document checklist and case status.

Support the specialist

Connect policy evidence, beneficiary details and review notes.



Premium and producer workflows affect service

Operational transformation extends beyond underwriting and claims.

01

Billing

Reconcile premium activity and collection exceptions.

02

Distribution

Organize onboarding, licensing and compensation review.

03

Customer 360

Connect policy and interaction context for authorized users.

An old core can support a better service journey

Genellipse assesses mainframe and IBM i dependencies before designing the integration.

Supported access

Use available APIs, events or controlled batch interfaces.

Operational resilience

Test replay handling, reconciliation and failure recovery.



A policy change that times out

The customer should not receive a false success message or a duplicated transaction.

01

Identify the request

Assign a stable transaction identifier.

02

Check the outcome

Read the authoritative record before retrying.

03

Resolve the exception

Route an uncertain result to a service owner.

Illustrative exception scenario.

Each release has a system of record

A phased migration needs explicit boundaries and a tested return path.

01

Partition the scope

Choose a transaction, portfolio or product.

02

Reconcile in parallel

Compare data and business results before cutover.

03

Retain recovery options

Agree rollback and support ownership.

Automation needs observable boundaries

Use Cortex AI inside a process the insurer can inspect and govern.

01

Permission

Limit data access and permitted tools.

02

Evaluation

Test accuracy, unsupported answers and unfair outcomes.

03

Accountability

Record evidence and route consequential decisions.

A shared view of service performance

GeneData and GeneAnalytics can connect operational measures with their source records.

01

Work queues

Age, volume and reasons for delay.

02

Quality

Rework, exceptions and repeated customer contacts.

03

Portfolio insight

Trends reviewed in the right product and period context.

A business case your team can measure

Illustrative monthly service improvement: 10,000 cases, with total handling reduced from 18 to 12 minutes.

01

1,000 hours released

Six minutes $\times$ 10,000 cases $\div$ 60.

02

Quality threshold

Stable accuracy, complaint handling and control outcomes.

03

Net value

Subtract review, licensing, integration and support costs.

Illustrative planning. Released capacity becomes cash savings only when costs actually reduce.

A useful starting point has a visible bottleneck

Select the problem with your operations and technology owners.

01

Life starting point

Application evidence or
policy-service preparation.

02

P&C starting point

Commercial submission
intake or claim-file
preparation.

03

Legacy starting point

A supported policy lookup
with reconciliation.

A focused MVP within six weeks

Limit the first release to one workflow, one data boundary and an agreed set of exceptions.

01

Weeks 1–2

Agree scope, baseline and data access.

02

Weeks 3–4

Configure, connect and test the workflow.

03

Weeks 5–6

Validate with users and decide the next release.

Defined scope and readiness gates apply. Enterprise rollout follows the accepted MVP.

A usable workflow needs a prepared team

Genellipse includes process ownership and adoption in the delivery discussion.

01

Train

Use representative cases and exception exercises.

02

Operate

Name support, incident and business owners.

03

Improve

Review outcomes and prioritize the next release.

Your next transformation starts with one workflow

Let's choose the Life or P&C workflow where your teams and customers will feel the improvement first.

Genellipse + your team

A shared roadmap, named owners and accountable delivery.

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