

AI-DRIVEN CUSTOMER ENGAGEMENT:

Transforming the Insurance Experience



Jamieson Fregeau
Co-Founder & President

Quandri ••

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Made with GAMMA



**Traditional customer
service is serving...
frustration**



It's serving... **frustration**



Impersonal interactions

Robotic interactions leave customers feeling undervalued



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Long wait times

Frustration builds during support delays



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Lack of context

Agents often lack critical customer history and context



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Rising Expectations

Customers are demanding better, proactive service

The reason?

Humans are difficult (and expensive) to scale

How companies have traditionally **scaled servicing**



Step 1:

Hire skilled agents to handle inquiries

Focus: Quality can be controlled



Step 2:

Scripts and helpdesk tools help manage interactions at scale

Tradeoff: Impersonal interactions



Step 3:

Build call centers and/or outsource to offshore VAs

Solution: Volume trumps quality

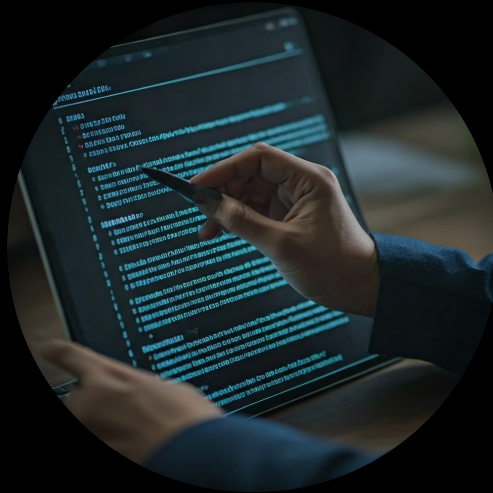
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Enter AI: **A new era of customer service**

The **AI evolution** of customer service

Traditional Model

Companies scaled services, sacrificing personalization for efficiency.



Human + Machine

AI augments humans, creating superior service experiences impossible with either alone.



AI Inversion

AI inverts the model, enabling personalized experiences that scale profitably.

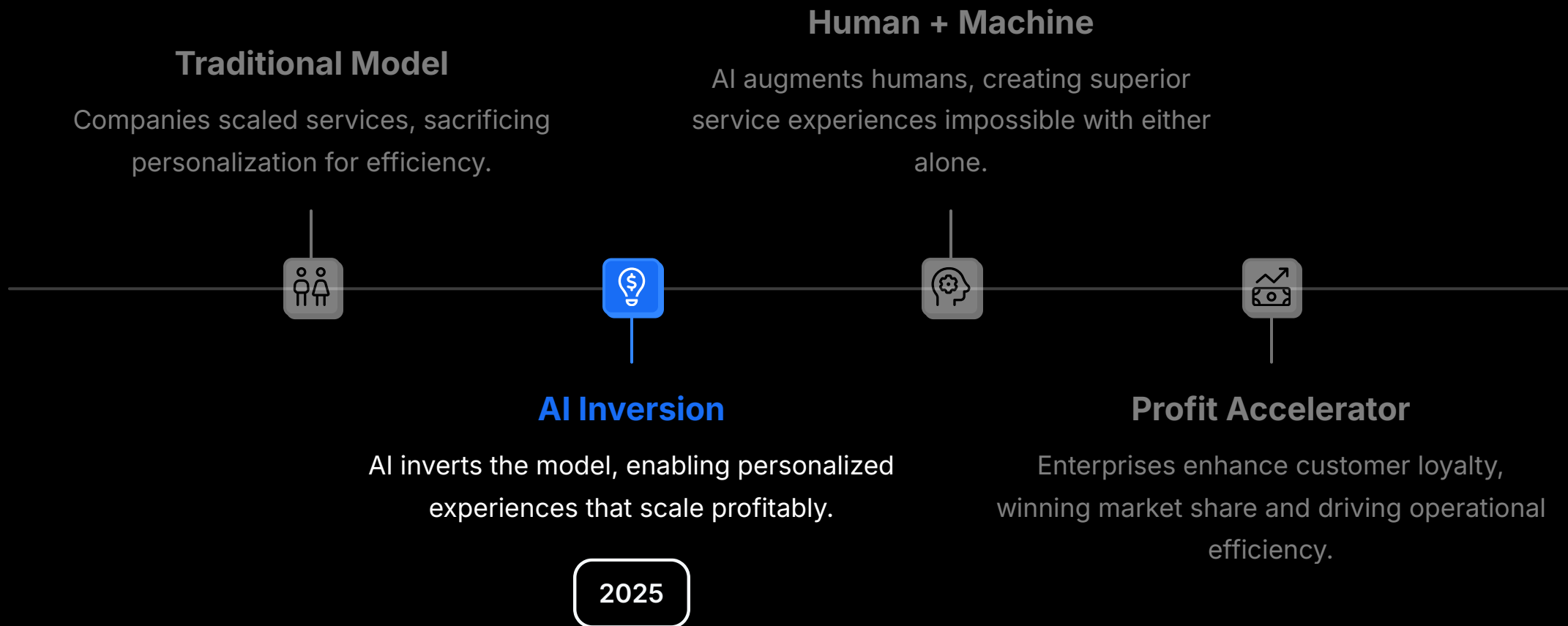


Profit Accelerator

Enterprises enhance customer loyalty, winning market share and driving operational efficiency.



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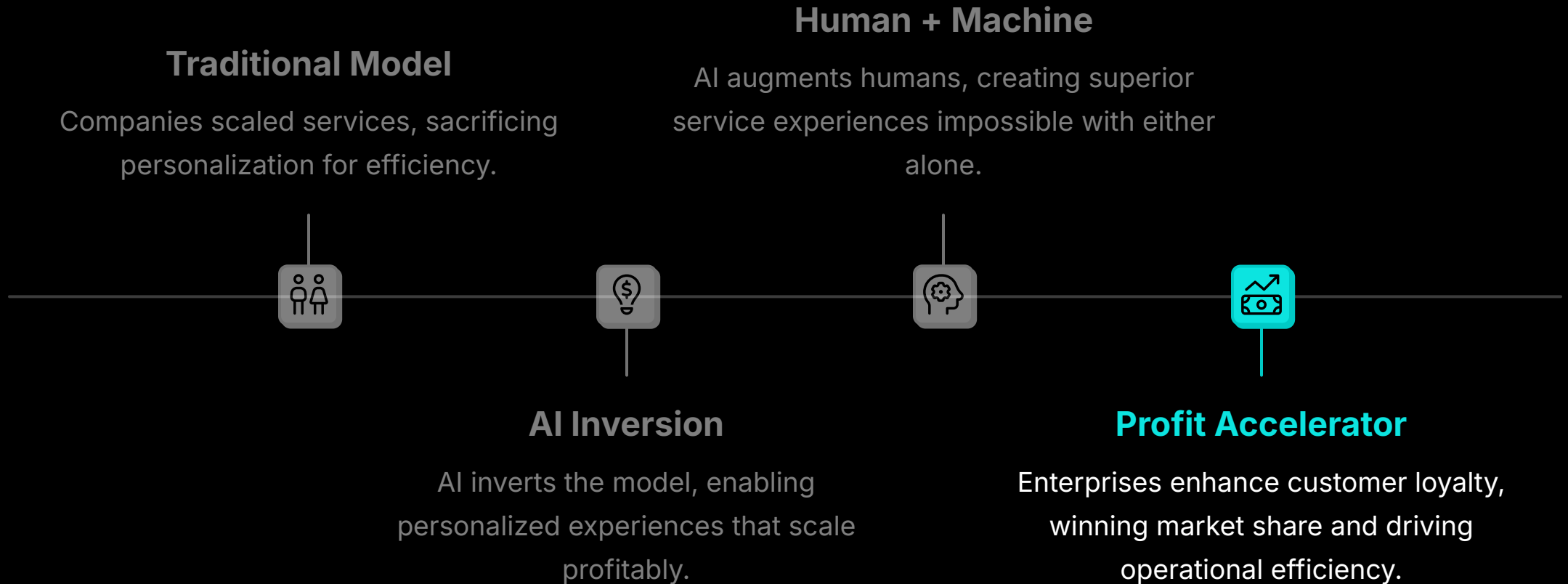


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AI customer service examples in the real world

AI in the **real world**

Empathetic AI

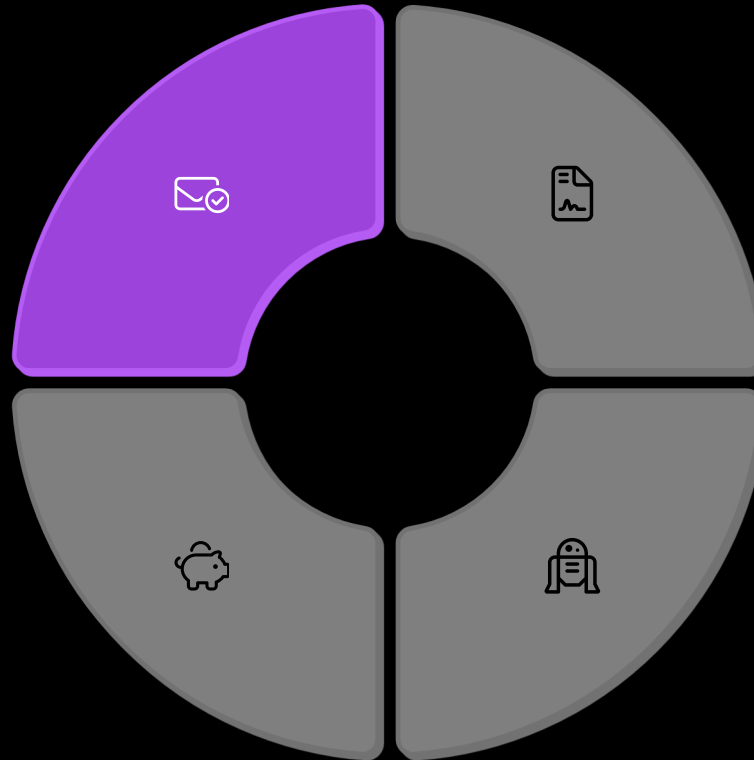


Uses OpenAI's GPT model to craft claims-related client emails.

Professional Service



LifeSync helps client set and track financial goals in real-time.



Contextual Understanding



Contract Intelligence (COIN) has saved 360k legal admin hours.

Automated Tasks



Agentforce provides specialized, always-on support to employees and customers.

AI in the **real world**

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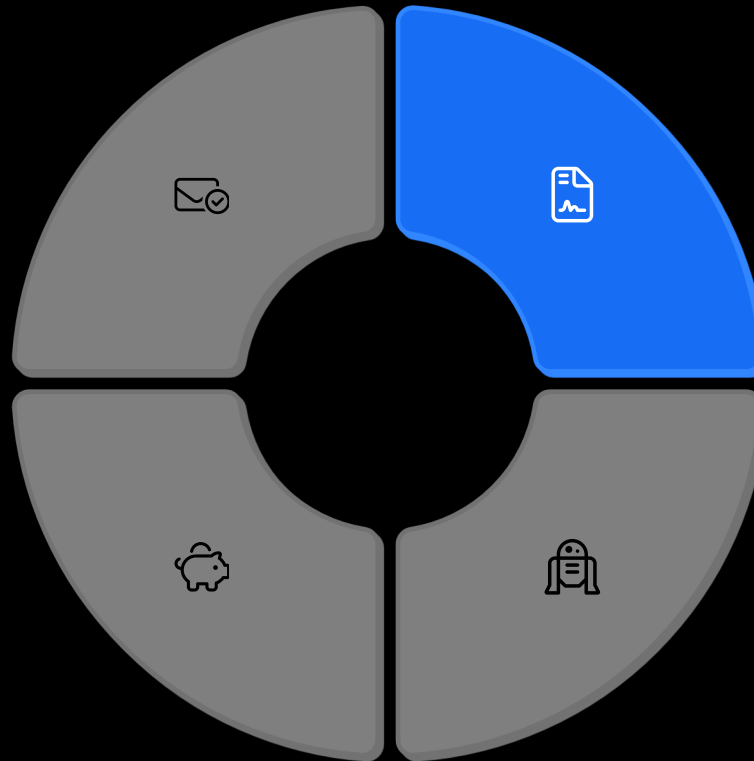


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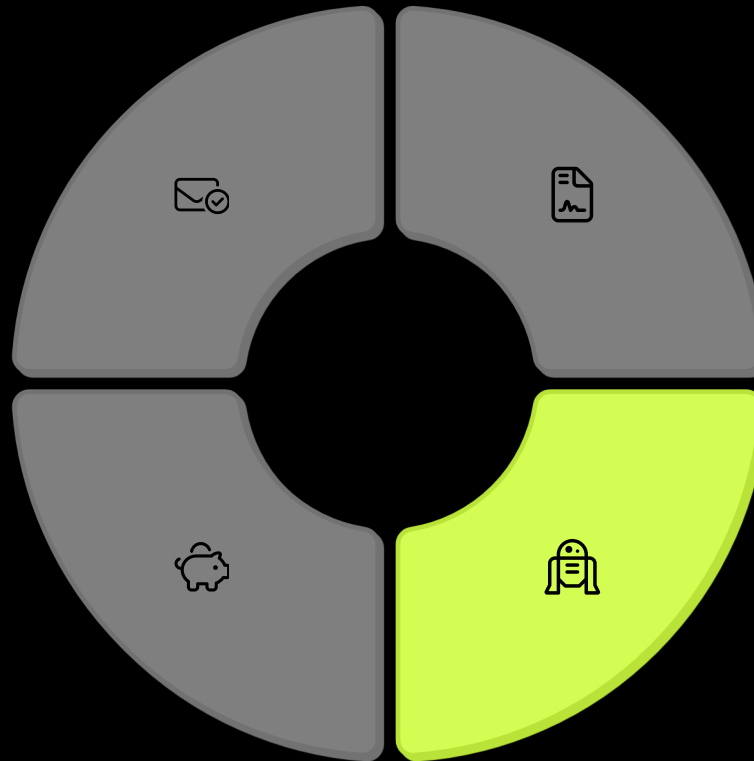


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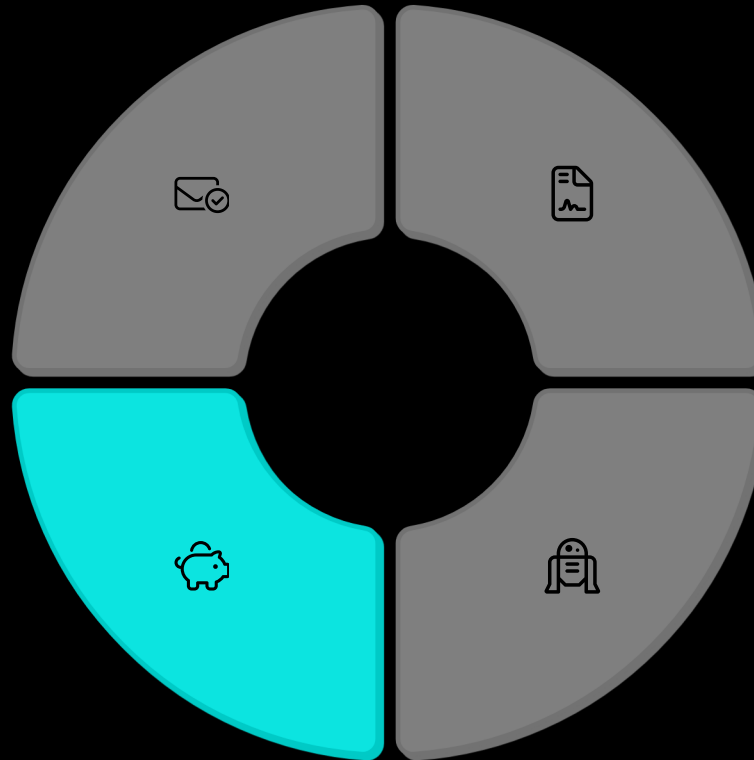


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AI in **insurance**

Quandri ☹️

Quandri's AI in **action**

Deep, Proactive Insights

AI instantly assesses renewing policies, identifies risks and opportunities for cross-sell and upsell across your entire personal lines book.

Instant Market Rate Quotes

evaluates and automatically sources multiple competitive quotes during the renewal process.

Intelligent Segmentation

Segments policies by various factors, prioritizing critical accounts for human agents, and automatically handling the rest with AI agents.

Hyper-Personalized Service

Every customer receives a relevant, personalized renewal communication from a human or AI agent. Industry average is 20%.



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How Quandri's AI works: **Verticalized and differentiated data**

Understanding **key data types**



Judgement Data

How to handle nuanced customer situations
ex. human expertise, decision-making patterns



System Data

The rules of the system in which the AI operates
ex. Financial regulatory frameworks, legal precedents, underwriting requirements



Process Data

Helps AI understand how to navigate complex tasks
ex. Workflows, operational procedures



Structured Data

Forms the foundation for service intelligence
ex. Customer records, product analytics, transaction history

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Quantifying Quandri's **impact**

Measurable **outcomes**

2%

Retention Increase

Enhanced customer loyalty through personalized AI interactions which drives significant revenue

10%

Revenue Expansion

Higher sales to existing customers through intelligent recommendations and increased loyalty

2x-3x

Cost Efficiency

Service delivery at a fraction of traditional model costs

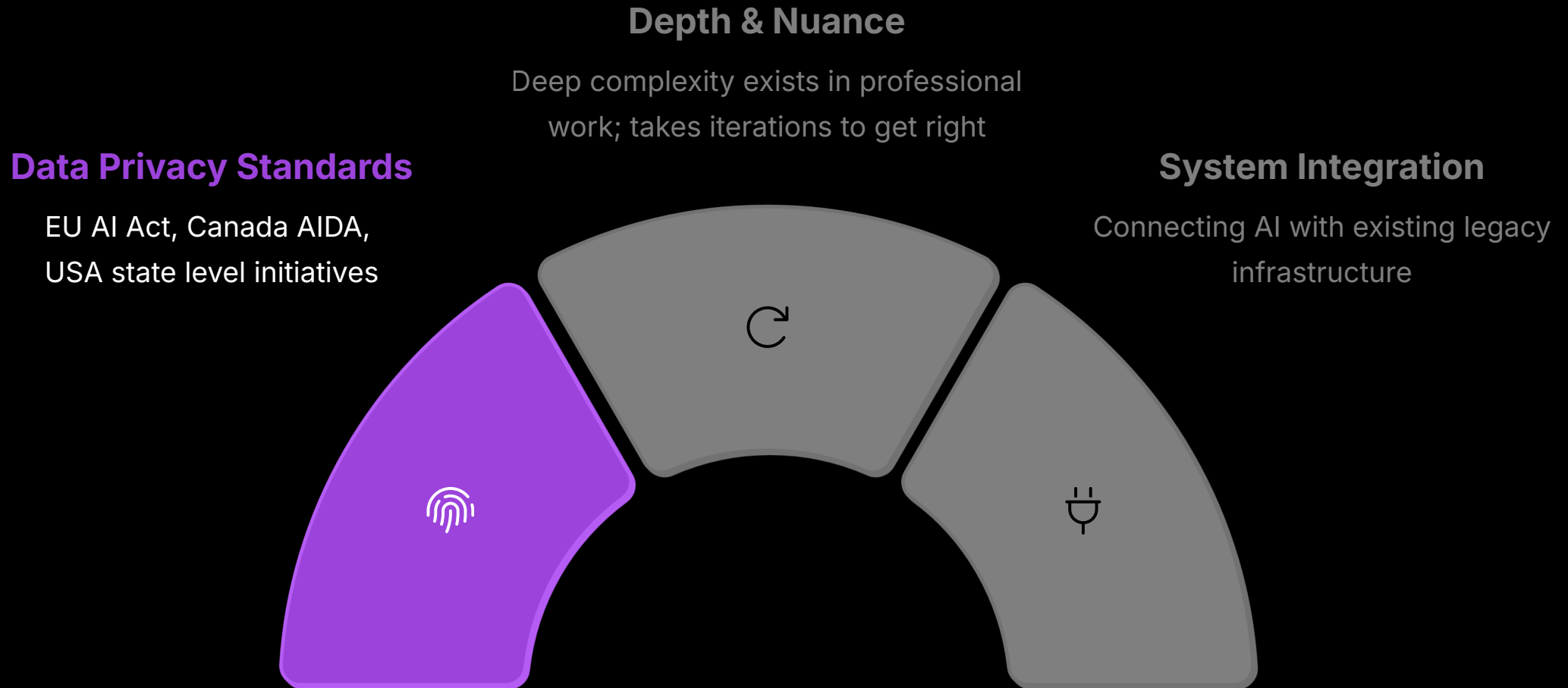
50%

Service Error Reduction

Reducing inconsistencies in service drives satisfaction, and direct savings

**AI sounds too good to be true.
What's the catch?**

As with all new technology, **hurdles exist**



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Depth & Nuance

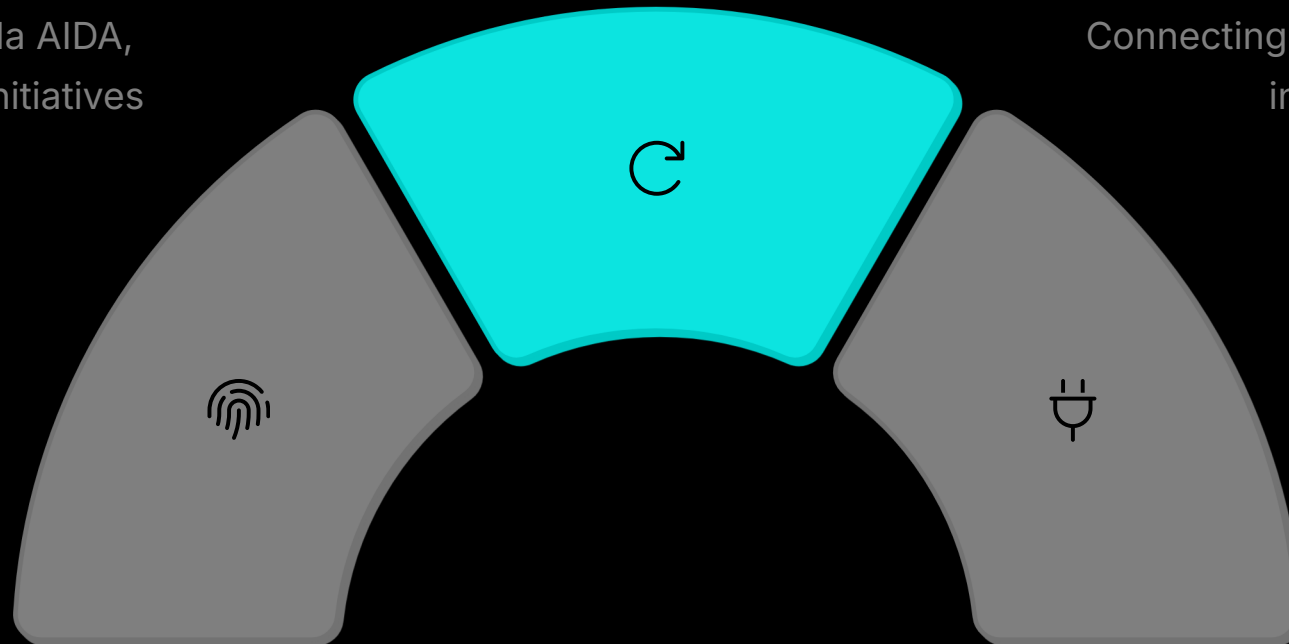
Deep complexity exists in professional work; takes iterations to get right

System Integration

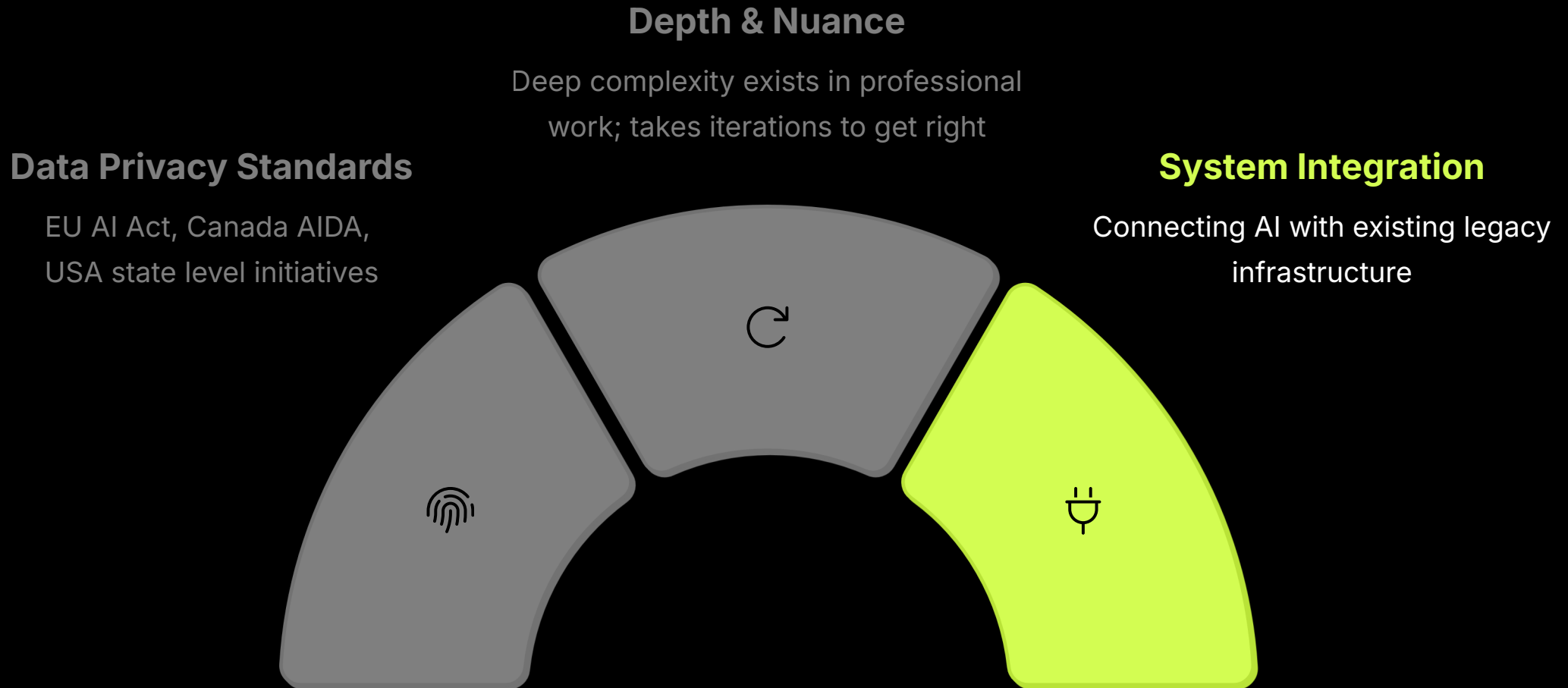
Connecting AI with existing legacy infrastructure

Data Privacy Standards

EU AI Act, Canada AIDA, USA state level initiatives



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**What can we expect to happen during the
client servicing AI Inversion?**

What to expect **next**



Complex Service Handling

AI will tackle increasingly sophisticated customer scenarios and higher levels of professional service



Omnichannel Integration

Seamless coordination across all communication touchpoints



Human-like Interactions

Empathetic responses indistinguishable from human agents



Further Specialization

Deeper vertical and sub-vertical expertise in domains like banking and insurance

See how AI can improve your **client servicing**

Drop by our table after the session to see a demo.

Quandri ☼



Sam Knudson

Account Executive



Jeremy Sugden

Account Executive



Kelly Watters

Industry Solutions