

## Streamline service. Improve efficiency. Get informed.

We solve the insurance industry's information problems—increasing sales, retention, and efficiency—by empowering customers and employees with the answers they need, right when they need them.

### The answers you need, right when you need them

Insurance is information-driven, but every year the industry's complexities cause billions of hours and countless sales to be lost to long, frustrating, manual searches for the right answers—the average individual insurance broker, underwriter, or member of support staff spends 1-2 hours per day looking for information to answer client questions.

By retrieving accurate answers on demand, the Ask Sage platform overcomes the chronic delays that slow down the industry—keeping your business moving and making brokers, underwriters, and service agents 10-20% more productive.

### Technology with a singular purpose

At ProNavigator, our only business is making the insurance business work better. That's why we designed the Ask Sage Platform with technology and features to target the information challenges of insurance.

#### One-stop search

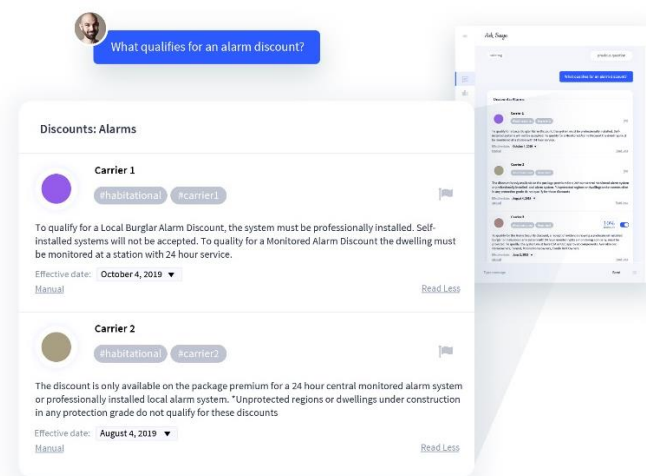
*Sage Assistant* is a natural language interface which lets brokers and staff quickly retrieve authoritative answers by searching your entire knowledge base.

#### Intelligent indexing

The *Sage Assistant* indexes insurance information by intent—enabling fast searches which account for synonyms and variations in terminology.

#### Answer retrieval

Rather than generating answers—which can lead to errors—the *Sage Assistant* retrieves answers and shows the authoritative source.



The user asks about alarm discounts—The Sage Assistant provides a summary and the source document, so there's no confusion.

We're proud to be trusted by more than 100 insurance organizations just like you.

# Insurance Information Technology

We combine deep knowledge of the insurance industry, passion for innovation, and appreciation of real business challenges to build solutions specifically for insurance.

With the Sage Assistant, you benefit from:

## Sage network

A private, secure ecosystem of brokerages and carriers which improves information flow: brokerages subscribe to updates from their carrier partners, and carriers simply push resources to their brokerage channels.

## Carrier benefits

Push resources automatically to ensure brokers always have what they need to sell your products effectively. Boost Staff Effectiveness. Make staff 10-20% more effective by enabling them to retrieve accurate answers right when they need them.

## Feature Overview

The Sage Assistant is a deceptively simple interface which retrieves accurate answers for your team members, fast.



### Sage Assistant

This screen will revolutionize your team members' and brokers day-to-day lives. The left side is a chat window; the right side is a multi-purpose information window. Users ask questions in the chat window, with conversational language—for instance, “Which markets have overland water products?”—and retrieved answers are displayed.

Crucially, users can search across the entire resource repository with a single inquiry (e.g., across documents or across many products), and they can use convenient shorthand to focus the search—for example, “Show payment options for @home @auto” or “Show all senior citizen discounts for #property”. The Sage Assistant is smart enough to understand and search for synonyms (e.g., “kids” and “children”, or “payment options” and “payment methods”), so users don't have to worry about ensuring a perfect match!

The Sage Assistant can communicate with your systems of record to request and validate data, and to update systems with new information provided by the user.



### Analytics

When someone uses the Sage Assistant, it creates a digital record. Analyzing usage trends lets you better understand broker and team member needs, and helps identify opportunities for operational improvements.



### Resources

Manage the insurance resources—bulletins, brochures, guides, home-grown cheat-sheets, policy wordings, quoting manuals, etc.—available to the Sage Assistant, so your users always have the best information.



### Manage Users

The Sage Assistant supports single sign-on (SSO) and role-based access control (RBAC). In this screen, system administrators manage user details, including activating/deactivating accounts and defining permissions.



### Training

This screen lets authorized users verify and validate new information within the Sage Assistant, ensuring that question and answer pairs account for new resources and revised versions of existing information.



### Support

This screen provides everything you need to get the most out of your Sage Assistant, including documentation, tutorials, and lets you open support tickets and enhancement requests with our team.



### Knowledge Base

A generated—but human-curated—repository of questions and answers related to certain topics. Curation allows organizations to intervene, for instance during coverage suspensions or to clarify unclear resources.

We'd love to understand your information needs to see how our solution can help.

Please reach out to us to schedule a conversation or demonstration.

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