



PRONAVIGATOR

Sage Assistant—Your On-Demand Insurance Expert

ProNavigator’s Sage Assistant empowers your staff to be 10-20% more effective by enabling them to retrieve the information they need—whether for sales, service, or another reason—right when they need it.

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 Sage Assistant 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 Sage Assistant with technology and features to target the information challenges of insurance.

One-Stop Search

Ask Sage is a natural language interface which lets 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 screenshot shows the 'Ask Sage' interface. At the top, there's a search bar with '#gore' and '+ add tag' buttons, and a 'previous questions' button. Below the search bar, a sidebar lists navigation options: Ask Sage, Analytics, Resources, Training, Knowledge, Users, and Support. The main content area displays the search results for 'What qualifies for an alarm discount?'. It shows a summary under 'Discounts: Alarm' with tags '#habitational' and '#on'. The summary text reads: 'Local Burglar Alarm Discount: To qualify the system must be professionally installed. Self-installed systems are not acceptable. Monitored Alarm Discounts: To qualify the dwelling must be monitored at a station providing 24 hour service. Effective date: November 1, 2018'. A 'Read less' link is visible. To the right, a source document titled 'Premium Discounts & Surcharges' is displayed, containing detailed information about alarm discounts and loyalty discounts.

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

We’re proud to be trusted by more than 90 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 brokerages and carriers. With the Sage Assistant, you benefit from:

- Natural language understanding, so staff can ask insurance questions the same way they'd ask a colleague or other expert—no training required!
- A one-stop, AI-assisted search engine which understands the intention behind each inquiry, guides users through investigative paths, lets them focus searches with hashtags (#) and at-mentions (@)—and which searches your entire resource repository at once!
- A 'summary-and-source' display which pairs a short answer with the authoritative source document—leaving no room for confusion
- Insurance-specific resource indexing which powers our fast, on-demand search capabilities by cataloging your entire knowledge base
- The Sage Network, which ensures brokerages are always—and automatically—up to date with the latest resources from their carrier partners

Plus, the Sage Assistant is constantly learning from how customers use it in the real world, so it's always getting smarter and even more capable.

Feature Overview

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



Ask Sage

This screen will revolutionize your team members' 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 from many carriers, or across many products), and they can use convenient shorthand to focus the search—for example, *"Show payment options for @Carrier1 @Carrier2"* 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 communicates with your systems of record to request and validate data, and to update systems with new information provided by the user. Additionally, the chat component can communicate with other systems like SharePoint, Microsoft SharePoint and Teams, Guidewire, Slack, and web browsers.

Carriers can easily add Ask Sage to broker-facing portals, enabling sales and reducing support needs.



Analytics

When someone uses Ask Sage, it creates a digital record. Analyzing usage trends lets you better understand customer 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.



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.



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.



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.



Support

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

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.

pronavigator.ai | info@pronavigator.ai | 1-855-906-5323