

An AI-driven transformation that outperformed the incumbent outsourcing solution, resulting in:

- Over **\$750,000** in direct cost savings
- More than **\$1 million** in new business revenue
- Over **80%** improvement in efficiency

Client Profile

The client is a rapidly expanding commercial insurance brokerage employing 1,300 people across more than 60 offices worldwide. Ranked among the top 20 U.S. brokers, they write over \$3 billion in premiums annually.

Initially, the client invested in business process outsourcing to manage their operations.

The Challenge

Despite spending over \$1.2 million annually on manual policy evaluation, the client continued to face backlogs and delays. The manual process required an additional layer of internal quality control, which increased the lag between renewal issuance and policy review.

Exdion Policy Check First AI Immersion and Rollout

The Exdion team brought deep domain expertise and was already a trusted partner to six of the top fifteen U.S. brokers.

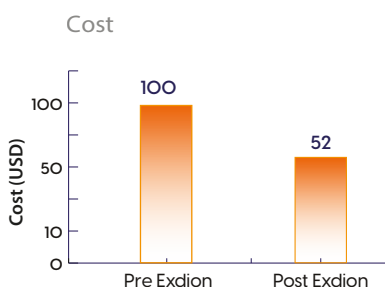
Exdion's Policy Check solution integrated seamlessly with the client's agency management system (AMS), enabling all policy check transactions to flow automatically through existing workflows.

Exdion Policy Check Benefits

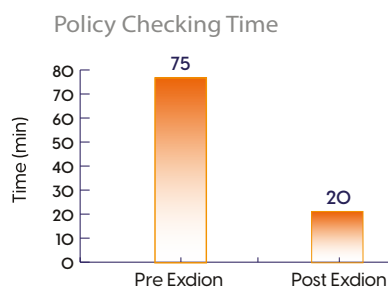
Designed specifically for the commercial insurance broker, the Exdion Policy Check platform handled the client's entire volume of more than 50,000 policies with ease, resulting in a 48% cost savings. It removed the need for manual intervention thanks to a fully automated AI-powered solution.

The client saw measurable gains, including:

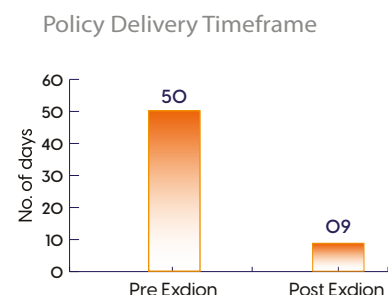
48% cost savings



73% reduction in the time it took to check a policy



82% reduction in the time it took to release the policy



Increase in customer satisfaction



Customer Satisfaction Progression

Increase in staff satisfaction



Staff Satisfaction Progression

The client also realized significant value through freeing up staff to concentrate on risk assessment, allowing them to work smarter and with less stress.

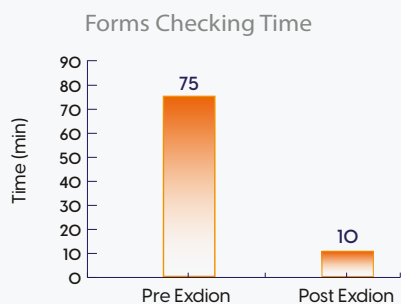
These targeted digital initiatives transformed the customer and staff experience and helped establish the foundation for the client to become a digitally enabled company. The agency could now reduce its reliance on outsourcing and external resources while enhancing its internal team's capacity and capabilities.

Next Set of Workflows

Following a successful year of policy checking, the client expanded their engagement to include Forms Comparison.

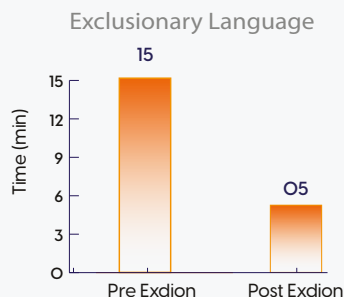
Forms Comparison

Exdion's solution was enhanced to isolate modified form language and flag key differences, reducing form review time by more than 86%.



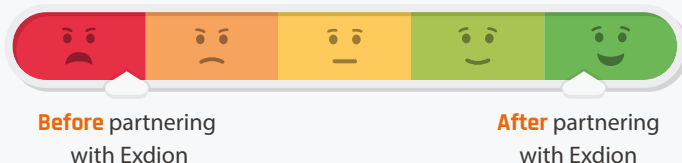
Exclusionary Language

Carriers may alter exclusionary language without brokers noticing. To address this, Exdion evaluated a large dataset of policy language and trained its AI engine to detect and flag exclusion changes proactively.



Efficiency Gains

Previously, Account Managers (AMs) spent 60-90 minutes manually reviewing each 150-page policy document. With Exdion's AI-driven approach, the system now highlights 25-30 exclusions, complete with page numbers and an X-Ray tool that directs AMs to relevant sections. This innovation cut manual effort by 70%.



Quote Compare

Earlier, new business quotes were compared manually, consuming significant time and effort. With Exdion's Quote Compare platform, the client could quickly assess coverages and costs—cutting evaluation time by 50%.

Coverage Gap Evaluation

Coverage gaps pose a significant risk in the brokerage business. Exdion collaborated with the client to define brokerage standards and trained its AI solution to detect missing coverages across various lines of business. Gaps are flagged and presented proactively.

Acquisition Assistance

Exdion's scalable AI capabilities support the client's growth through mergers and producer group hires.



"We used to be head hunting before. We don't have to do that anymore. We now have a steady pool of agencies, producers and groups wanting to work with us. We now have the advantage of being selective about who we choose. This welcome change came from the producer and the servicer experience we are able to deliver through leverage of the Exdion AI platform and the fact that all this contributes to more sales and revenue for all"

– Chief Operations Officer

Transformation Summary

With Exdion's AI-powered SaaS+ solutions, the client achieved faster turnaround, reduced operational costs, and improved satisfaction—for both customers and staff.

Trusted by Leading Insurance Companies and Brokers



About Exdion

Exdion Insurance is your strategic digital and AI partner—offering end-to-end solutions customized to meet the needs of modern insurance brokers.

Awards



For more information on the Digitization Experience
or to discuss a specific use case, email us at info@exdion.com



Exdion Solutions, Inc., Plano, TX



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