



# Insurance

An agile process model to manage, monitor, and assess risk.

## SIMPLIFY YOUR SYSTEM & EMPOWER YOUR PEOPLE

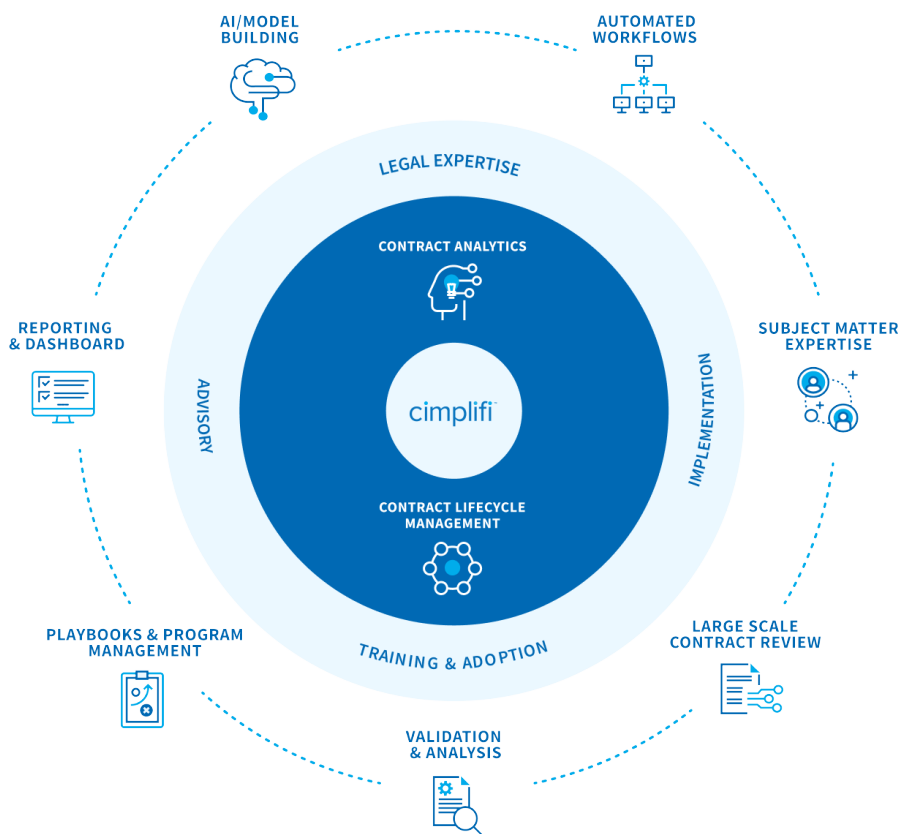
Leveraging dedicated consultants with experience implementing DocuSign products, experience a more efficient enterprise solution implementation.

## REALIZE INCREASED ROI FASTER

Correctly leveraged AI technology, via the DocuSign Agreement Cloud, can result in increased productivity and cost savings by automating repetitive manual tasks facilitating users to focus on complex activities. Cimplifi facilitates necessary requirements gathering and gap analysis to ensure an organization realize these gains in an expedited fashion.

## SME EXPERTISE

Cimplifi is a full-service, accredited DocuSign Agreement Cloud platinum partner focused on Insight, CLM, and CLM+. With 15+ years of combined experience in contract analytics, our consultants have delivered end-to-end implementations of the Agreement Cloud across a range of industries from finance to entertainment.



## Key insights to be drawn from insurance carrier policies, commercial CGL, and BI Use Cases

- Quick Access to key data points: Coverage Term, Payment Limits/Caps, Exclusions, Endorsements, Co-insurance parties, Grace Period and Reinstatement Period Tracking**  
Leverage AI Models to commoditize contract terms for quick access to key data points for standard Carrier Policies (Home/Life/Auto) and CGL & BI Policies. Accelerate response time for regulatory, event, and renewal triggers. Provide a portfolio-level overview of key metrics for enhanced transparency and comprehensive review. Key dates can be mapped as policy metadata.
- Assess Risk with Customized Scorecards**  
AI Models and Analysis Scorecards can be deployed to actively track Policy and Contract Risks based on target data points or policy value thresholds. This includes Endorsements/modifications, Co-insurance agreements, Reinsurance, Policy Exclusion List data extraction and reporting (Workers Compensation, Pollution Liability, Manufacturers' Liability, etc.)
- Targeted Project-based Analysis**  
Analysis Programs. Examples include Key Date metadata organization, BI Legislation events, policy holder events - restricted access to premises (interruption by civil authority), leader/attraction property clauses, CGL bodily injury and medical payments terms. (Volume of claims increased with Covid-19 Pandemic and commercial effect. Policy valuation assessments can be measured at enterprise-level leveraging metadata. )
- Scalable Data Organization System**  
The Key Data Points for Standard Carrier Policies and CGL/BI Policies can be organized and monitored for continued use, including integration with a CLM Solution for enterprise-level Contract Management. (Document generation, routing, repository storage)
- Policy/Contract Family Mapping**  
Example: Accurately map Life Insurance Policies and Riders (Accelerated Death Benefit/Long Term Care, etc. ) Contract Analytics and CLM solutions can work in unison for accurate storage in a single document repository.



### DEEP MARKET KNOWLEDGE

Comprehensive regulatory knowledge



### INNOVATIVE SOLUTIONS

Custom workflows, including table data extraction DAC integrated solutions to address complex use-cases



### IMPLEMENTATION & ADOPTION

Support for change management and accelerated adoption



### INDUSTRY LEADERS

50+ years in-house financial services experience, plus additional verticals and industry expertise



### VERSATILE

Develop, augment, and manage a single phase to an entire lifecycle, driving growth and adoption through positive outcomes

Ready for a more empowering experience?  
Get in touch today to speak to an expert.  
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