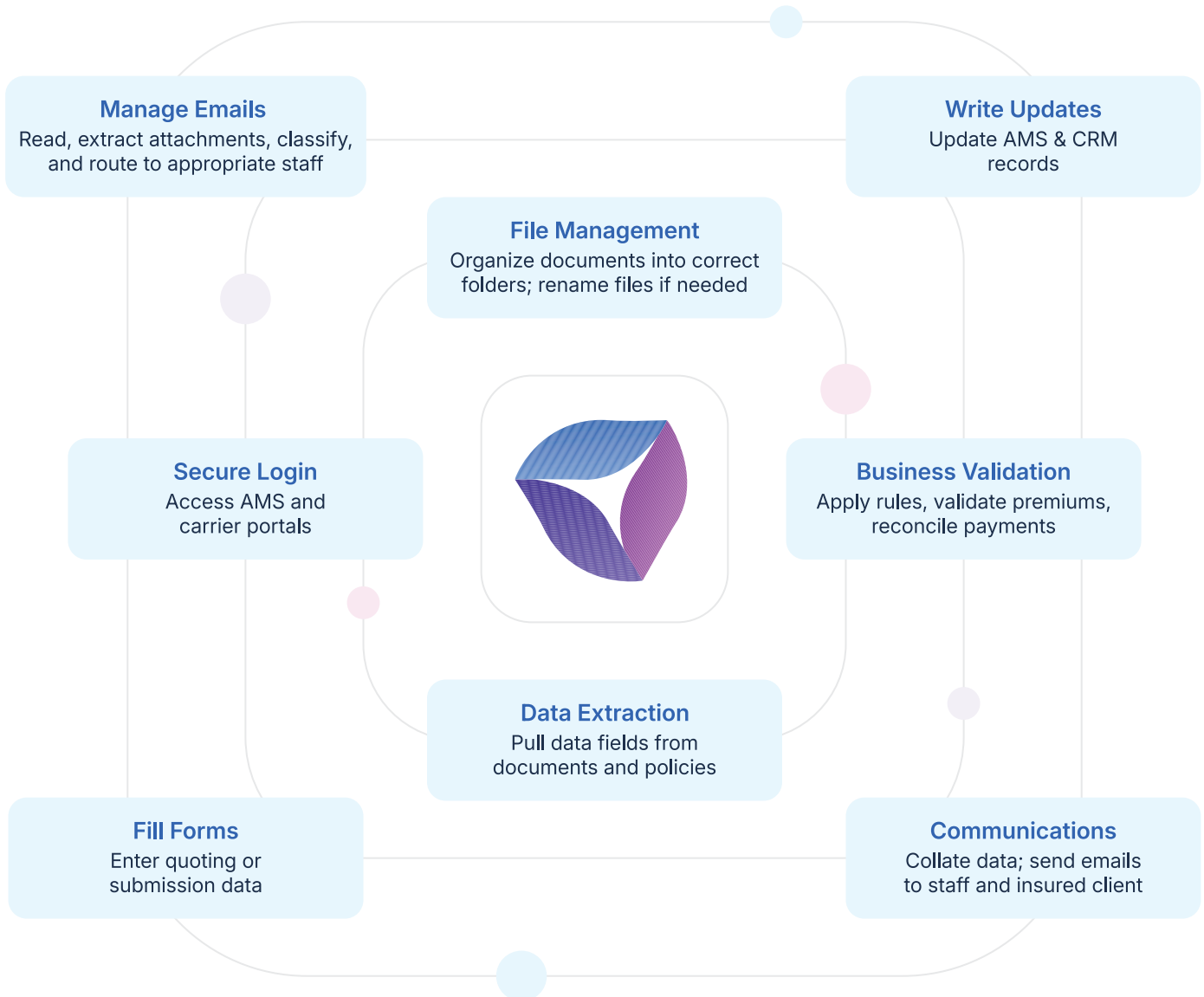


Let Your Account Managers and CSRs Drive Growth.

Let vBots Do the Mundane.

vBots automates the full spectrum of insurance agency operations. Deployed across 100+ agencies, our intelligent assistants fit into how you already work and start delivering time back from day one.



Automate and Scale Agency Operations Without Adding Staff

Most agencies run on four operational pillars:

- Policy Management
- Accounting & Audits
- Client Servicing
- Growth Enablement

vBots automates workflows across all four pillars, so your team can focus on growth.



Policy Management Automation

PILLAR 1



Document Retrieval

Automates document extraction by securely logging into carrier portals, navigating accounts, retrieving policy documents, and attaching them to the correct AMS record.

- Retrieve documents without delays
- Organize all policy downloads
- Rename based on naming conventions
- Reclaim time spent on manual portal logins



Policy Renewals

Identifies policies approaching renewal, retrieves renewal documents from carrier portals, compares prior and current terms for changes, and updates renewal status in the AMS.

- Handle higher renewal volumes
- Flag significant coverage or premium changes
- Eliminate renewal backlogs
- Reduce data entry errors



Policy Checking

Extracts policy data from carrier portals, AMS, and specified input sources, compares carrier-issued information with internal records, and flags discrepancies for team review.

- Identify coverage gaps instantly
- Catch discrepancies across carriers and lines
- Reduce E&O exposure
- Free CSRs from manual comparison work



Notice of Cancellation

Monitors carrier portals for cancellation notices, downloads and validates NOC documents, records them in the AMS, notifies policyholders, and triggers follow-up tasks for the team.

- Prevent missed cancellation notices
- Monitor reinstatements automatically
- Reclaim hours spent on manual tracking
- Send NOCs to the insured via email or text



Endorsements Processing

Extracts endorsement details from emails and attachments, validates them, applies verified changes directly to the correct policy records, and notifies the assigned CSR.

- Fast-track policy change requests
- Update records without manual intervention
- Eliminate manual data entry errors
- Reduce turnaround time on endorsements

Accounting & Audits Automation

PILLAR 2



Billing Reconciliation

Extracts carrier commission statements and invoices, reconciles them against agency records, and identifies variances.

- Identify commission variances instantly
- Fast-track agency billing
- Reclaim time spent on manual reconciliation
- Keep financial records audit-ready



Data Cleanup

Monitors AMS records to fix inaccuracies and inconsistencies. Using defined rules, it corrects data, flags exceptions, standardizes all records, and tracks client status over time.

- Eliminate duplicate account records
- Identify and fill missing account fields
- Scale data quality checks
- Reduce manual corrections over time

Client Servicing Automation

PILLAR 3



Certificate of Insurance (COI)

Automates COI generation by extracting verified policy details from the AMS and validating certificate holder information before issuing the document.

- Accelerate certificate delivery
- Handle high-volume COI requests
- Bypass manual data entry
- Reduce service team workload



Email Categorization

Brings structure to high-volume inboxes by classifying incoming emails by type and assigning each email to the appropriate workflow, team, or queue.

- Sort service requests instantly
- Reduce service requests backlog
- Route emails to the right desk
- Improve time to first response

Growth Enablement Automation

PILLAR 4



Quote Generation

Automates quoting by submitting policy details to multiple carrier portals or rater systems, retrieving and comparing quotes based on set rules, and delivering the best option to the prospect.

- Automate multi-portal data entry
- Eliminate manual re-keying errors
- Deliver proposals faster
- Scale quoting capacity



Submission Intake

Captures submission data from emails and forms, validates required information, and converts it into structured AMS records.

- Eliminate redundant manual data entry
- Reduce submission backlog
- Structured AMS records
- Handle more submissions without slowing down

Gain a Competitive Advantage with AI-Powered Automation

01

Operational Efficiency

vBots automates critical policy workflows, reducing operational friction and freeing your team to focus on nuanced decisions.

02

Growth without Strain

vBots streamlines insurance workflows so you can scale, improve productivity, and retain clients, without expanding headcount.

03

Elevated Client Experience

Automated service workflows speed up responses and cut delays, allowing teams to prioritize client interactions that build loyalty.

04

Returns that Compound

By reducing manual effort, error rates, and rework, vBots lowers operating costs and drives profitability.

**Ready to give your team back their time?
Let's build your automation roadmap.**



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