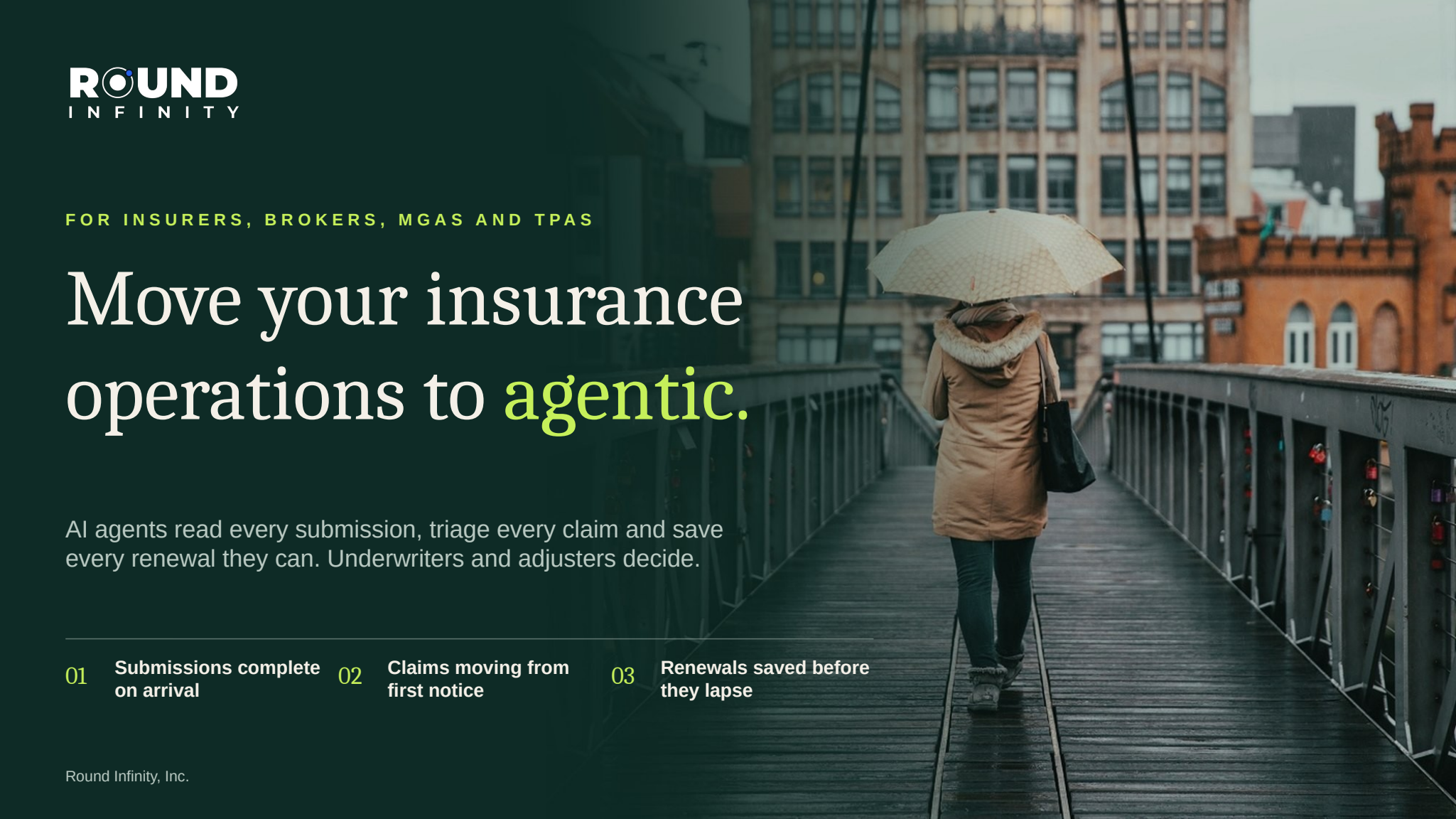
ROUND INFINITY

FOR INSURERS, BROKERS, MGAS AND TPAS

Move your insurance operations to agentic.

AI agents read every submission, triage every claim and save every renewal they can. Underwriters and adjusters decide.

01	**Submissions complete on arrival**	02	**Claims moving from first notice**	03	**Renewals saved before they lapse**



Round Infinity, Inc.

From manual to agentic.

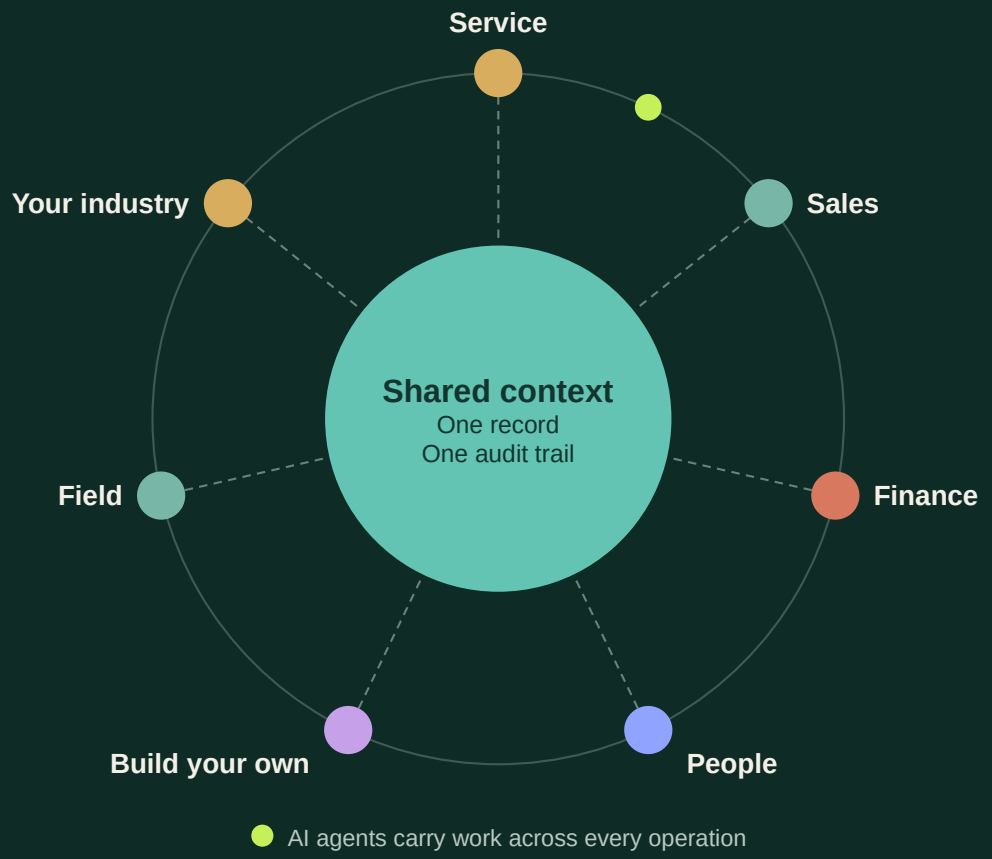
TODAY		WITH ROUND INFINITY
Proposals rekeyed from PDFs	→	Proposals, reports and loss runs read into the submission
Underwriters assemble every file	→	Each risk summarized against guidelines, triggers highlighted
Claimants chase status by phone	→	Claims triaged at first notice; claimants kept updated
Lapses noticed after the renewal date	→	At-risk renewals found and offered tailored terms



Every operation on one shared context.

Your industry's workflows and your core operations run on one shared context. An agent that picks up a task sees every customer, case, contract and payment it touches, and acts across your systems.

One record	Customers, documents and decisions stay connected.
One audit trail	Every action, by an agent or a person, is recorded.
AI agents that act	They prepare, decide within limits and hand off.
People in control	Approvals sit where judgment matters.



One policy journey, end to end.

Five steps. Pack apps hold the work, AI agents do it, people decide, and a Round Infinity use case completes each step.

01 QUOTE

Capture and quote every new risk

AI AGENT

Insurance Sales

Collects quote details from brokers and customers.

APP Broker & Agent Portal

PEOPLE Sales teams close the policy.

USE CASE **Sales Execution**

→

02 UNDERWRITE

Underwrite with documents read and checked

AI AGENT

New Business Document · Underwriting Support

Reads submissions and prepares the risk summary.

APP Underwriting Workbench

PEOPLE Underwriters decide and price.

USE CASE **KYC & Onboarding**

→

03 SERVE

Service every policy on every channel

AI AGENT

Policy Service

Completes endorsements and answers policy questions.

APP Policy Servicing · Policyholder Portal

PEOPLE Service staff take exceptions.

USE CASE **Service**

→

04 CLAIM

Take every claim and move it to settlement

AI AGENT

Claims Intake & Triage · Orchestration

Registers claims, triages and coordinates surveyors.

APP Claims Workbench · Surveyor App

PEOPLE Adjusters decide settlement.

USE CASE **Field Service**

→

05 RENEW

Retain policyholders before they lapse

AI AGENT

Renewal & Retention

Predicts lapse risk and prepares renewal offers.

APP Renewal Manager · Premiums

PEOPLE Retention teams make the save.

USE CASE **Accounts Receivable**

04 UNDERWRITE

Every risk, summarized.

The Underwriting Support agent summarizes the risk against your guidelines and recommends terms. The underwriter decides.

- Proposal and documents
- Risk factors
- Guideline fit
- Referral triggers
- Recommended terms

POWERED BY

INSURANCE PACK Underwriting · Support agent

+ USE CASE KYC & Onboarding

PREPARED BY AI AGENT *Illustrative*

Submission S-10293 · SME property

Broker submission · received today 10:12

RISK	Warehouse, 2,400 m² · sprinklered
LOSS RUNS	One water claim in five years
GUIDELINES	Within appetite · flood zone 2
REFERRAL	Sum insured exceeds handler authority

RECOMMENDED TERMS

Accept with flood excess and sprinkler warranty

Underwriter decides · senior referral drafted

Six insurance agents. Each with a partner.

AGENT 01

Insurance Sales

Answers product and cover questions and prepares the quote request.

+ Sales Execution

AGENT 02

New Business Document

Reads proposals, reports and loss runs; flags gaps and conflicts.

+ KYC & Onboarding

AGENT 03

Underwriting Support

Summarizes risk against guidelines and recommends terms.

+ Legal Operations

AGENT 04

Claims Intake & Triage

Takes first notice, reads photos, classifies severity, flags fraud.

+ Service

AGENT 05

Claims Orchestration

Appoints surveyors and garages, chases reports, summarizes files.

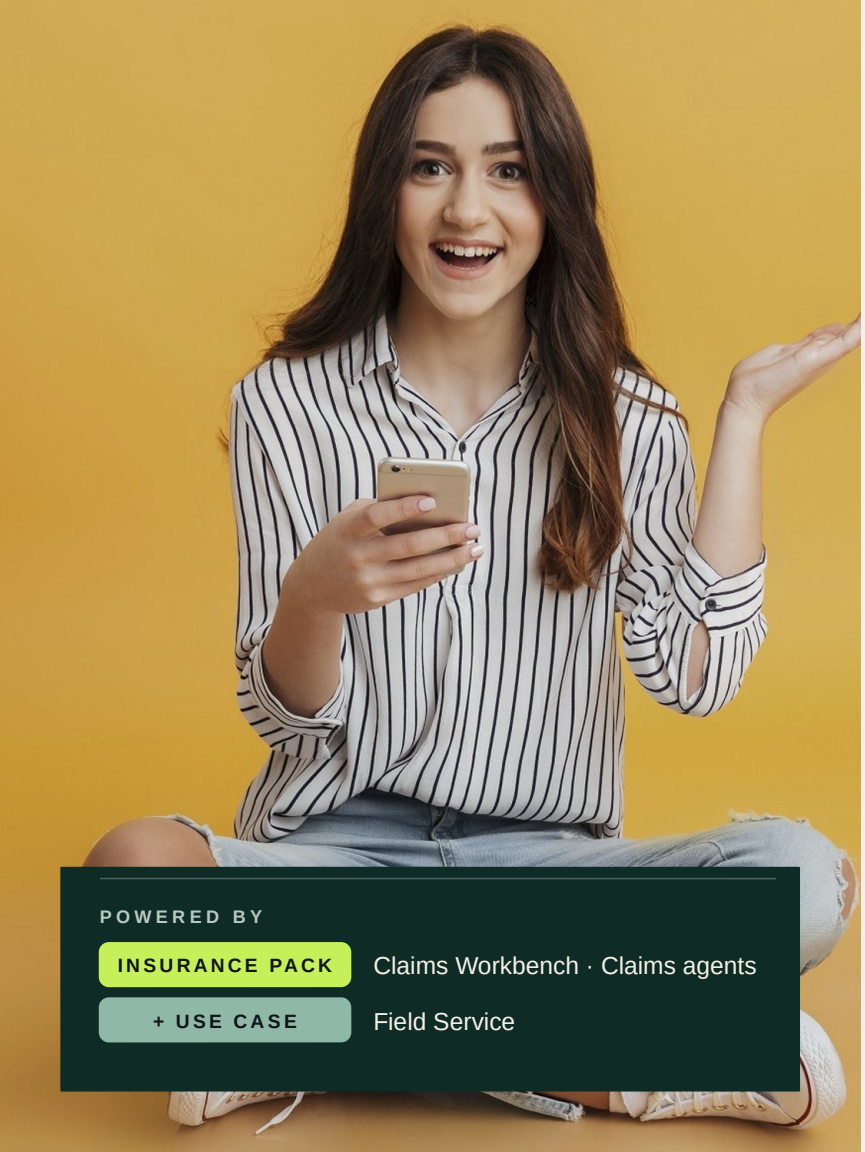
+ Field Service

AGENT 06

Renewal & Retention

Predicts lapse risk and drafts tailored renewal offers.

+ Accounts Receivable



POWERED BY

INSURANCE PACK — Claims Workbench · Claims agents

+ USE CASE — Field Service

06 CLAIM

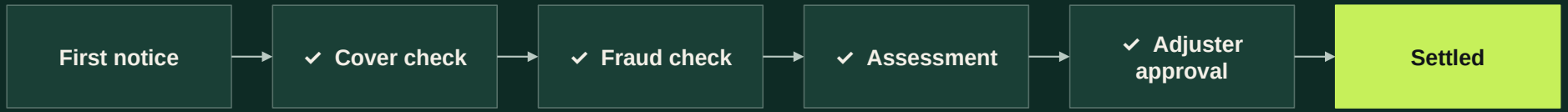
Every claim moving from day one.

First notice, triage, assessment and approval run as one file, and the claimant always knows the status.

ACTIVITY · MOTOR CLAIM C-55120 *Illustrative*

08:14	CLAIMANT	Reported a collision in the app with photos
08:15	AGENT	Read photos · moderate damage · cover confirmed
08:15	AGENT	Fraud checks clear · claim triaged
08:20	AGENT	Appointed garage and assessor · claimant updated
13:40	ASSESSOR	Uploaded inspection report and estimate
13:42	AGENT	Summarized the file for the adjuster
15:05	ADJUSTER	Approved repair · settlement scheduled

Settled faster, with every check in place.



Serve

Policyholder, broker and claimant contacts on voice, WhatsApp, email and chat are understood, summarized and resolved, or routed with context. Endorsements are changed, re-rated and reissued.

POWERED BY

INSURANCE PACK — Policy Servicing · Service agent

+ USE CASE — Service

Renew

Before each renewal, the Renewal & Retention agent predicts lapse risk, drafts personalized offers and follows up with customers and brokers.

POWERED BY

INSURANCE PACK — Renewal Manager · Retention agent

+ USE CASE — Accounts Receivable

Eight applications, built for insurance.

Broker & Agent Portal
Quotes, submissions, documents, commissions

Submission & Underwriting
Referrals, authority and decisions

Policy Servicing
Endorsements, cancellations, certificates

Claims Workbench
FNOL, reserves, assessments, settlement

Surveyor & Assessor App
Inspections, photos and field reports

Renewal Manager
Renewal pipeline, terms and lapse risk

Policyholder Portal
Quotes, claims, evidence, payments, chat

Premium & Payments
Premiums, instalments, payouts, refunds



Use cases that complete the picture.

All sixteen run on the same record, users and audit trail as the Insurance pack.

● In the Insurance pack

FINANCE

- **Accounts Payable** ●
  Repairer, hospital and vendor invoices paid.
- **Procurement**
  Spend controlled before it is committed
- **Accounts Receivable** ●
  Premiums, instalments and lapses collected.
- **Financial Close** ●
  Reserves, reconciliations and audit evidence.
- **PO to Cash**
  Clean orders, fewer delays
- **Travel & Expense**
  Policy enforced before money leaves

CUSTOMERS & REVENUE

- **Service** ●
  Policyholder and broker contacts, one case.
- **Appointment Scheduling**
  Fuller calendars, fewer no-shows
- **Field Service** ●
  Surveys and inspections dispatched with proof.
- **Prospecting** ●
  Broker and customer growth campaigns.
- **Sales Execution** ●
  Quotes and submissions tracked to bound.
- **Online & In-Store Sales**
  More sales recovered, promises kept

PEOPLE & CONTROL

- **Recruitment**
  Faster hiring with explained shortlists
- **KYC & Onboarding** ●
  Identity, sanctions and fraud checks.
- **Legal Operations**
  Faster answers, no missed obligations

PLATFORM

- **Build Your Own**
  From idea to live operation, fast

START WHERE IT HURTS

Pick the operation with the most delay, manual effort, customer friction, control risk or cash impact. Finish it end to end, then add the next.

Tracked from request to done.

WORKFLOWS

Submission to issuance	Quote, bind and issue
Underwriting referral	Authority limits, senior approval
Mid-term endorsement	Change, re-rate and reissue
FNOL to settlement	Survey, assess, approve and pay
Fraud referral (SIU)	Flag, investigate and decide
Renewal offer and follow-up	Lapse risk, offer, broker follow-up

DASHBOARDS



Quote-to-bind ratio

By product, broker, channel



Underwriting TAT

Submission to decision



Claims cycle time

Cycle time and leakage by line

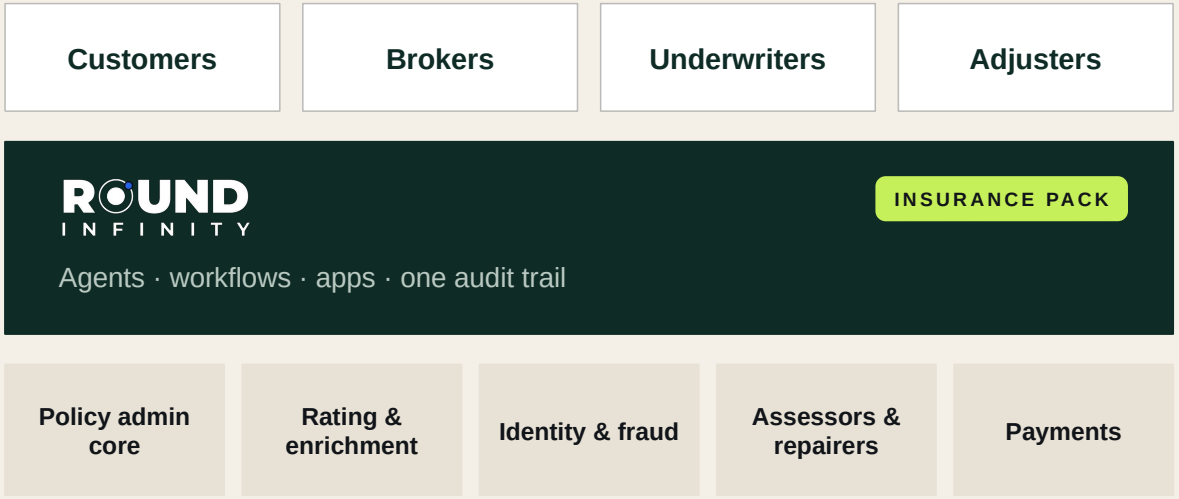


Renewal retention

Renewed, lapsed and saved

Works alongside your policy core.

Policies and rates stay in your core. Round Infinity runs submissions, servicing, claims coordination and renewals around it.



Your systems of record stay where they are

INCLUDED WITH EVERY SUBSCRIPTION

- AI Execution Engine
- AI Agent Builder
- Workflow Automation
- Customer 360
- Apps & Portals
- Integrations & APIs

Price the full journey, not just the pack.

Platform

Named users and the core platform

+

Insurance pack

Apps, agents, workflows and dashboards above

+

Use cases

KYC & Onboarding · Service · Sales Execution · Accounts Receivable

+

Usage

AI, voice and messaging — pay as you use

One platform, one data model, one user set, one audit trail. The pack and your use cases share all of it.

Price your operation → roundinfinity.com/pricing

ROUND INFINITY

NEXT STEP

See it run on your claims and renewals.

01	**Walkthrough**	Map submissions, servicing, claims, renewals
02	**Demo**	See the agents move a claim to settlement
03	**Quote**	Platform, pack and usage — sized to you

Book a demo →

roundinfinity.com