

AI-Powered Automation for Group Benefits: Quoting & RFP Intake

Why automate the intake process for requests for proposal (RFP)?

- Deliver great experiences for brokers, consultants, and employer group administrators through automating and expediting the Group Benefits sales quoting and RFP intake process.
- Improve ease of business-to-business interactivity by reducing turnaround times, supporting high volume processing, and reducing operational burden.



Where does the current process fall short?

The challenges encountered during peak periods of Group Benefits sales and renewals impede the efficient handling of quote requests and proposal communications. Manually triaging these requests, particularly those with intricate attachments, delays responses and slows down sales cycles as the information is meticulously evaluated for completeness and accuracy.

Why use AI?

Ushur's applied Artificial Intelligence (AI) solutions automate the processing of incoming request for proposal emails and their numerous attachments. This streamlines system setup in preparation for timely completion and response, eliminating the need for human intervention and accelerating the delivery of precise quotes.



Request Intake

- Classify requests
- Parse attachments
- Respond to sender



File Processing

- Extract key data
- Identify missing fields
- Clean & validate data



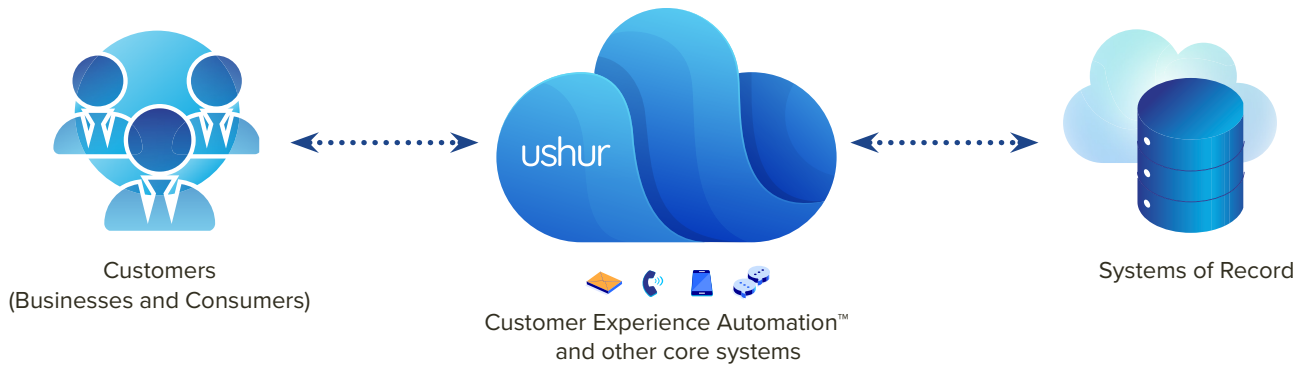
Data Reconciliation

- Review data output
- Collect missing items
- Update file accordingly



Systems Updates

- Update systems
- Notify stakeholders
- Initiate next steps



Ushur Customer Experience Automation™ Platform

Ushur's AI-powered, no-code Ushur Customer Experience Automation™ platform provides highly-regulated industries like Insurance, Healthcare and Financial Services with the speed, security and simplicity they need to automate the Quoting and RFP Intake process. Ushur uses AI to shorten the steps that prevent rapid RFP response, including classifying incoming requests, extracting data from emails and attachments, gathering missing information and updating information within client systems for quote and proposal team finalization.

INVISIBLE APP™

Prompt for missing information from the sender through a secure and structured app-like experience to complete the request.

SMARTMAIL™

Triage emails into their appropriate queue and route attachments for downstream processing.

INVISIBLE PORTAL™

Intake RFP documents and requests through a secure, purpose-built agile activity hub.

CONVERSATIONAL APPS™

Reach out to stakeholders or respond to requests with automated two-way communications over any channel.

INTELLIGENT DOCUMENT AUTOMATION™

Process RFP files through data extraction, validation and transformation for updates into backend systems.

**5 days to
5 minutes**

reduction in proposal
request turnaround time

~85%

of RFP requests
automated

3 months

from inception
to production

