

Reinvent Advisor of the Future

GenAI Companion

for insurance advisors to make
data-driven decisions and build
Holistic Client Relationship



Introduction

Advisor of the Future is a Next-Gen advisor platform to meet the elevated needs of today's, and tomorrow's, end clients. Insurance Advisors can track customer journey data across every channel, every touchpoint to visualize holistic customer relationships. The platform offers data driven insights and recommendations that enables advisors to build and nurture trusted client partnerships through pro-active engagement. Gen-AI infused capabilities helps personalize interactions and drive productivity.

Advisors can



Unify customer journey and touch points across all channels and gain holistic view of customer with Customer Journey Lake house



Stay ahead and anticipate customer needs pro-actively through AI recommendation engine for Hyper personalized customer engagement journeys



Get real time guidance and access to customer, product and policy info with Gen AI companion that can summarize, search or create personalized content



Access insights across channels consistently with flexibility to advisors where they want it

Key Capabilities

AI powered insurance specific analytical models

AWS cloud hosted Customer Journey Lake House

Pre-built connectors to data sources and systems

Omni Channel/Device experience

Access to 3rd party data through AWS data exchange

Support for Life, Annuity and P&C insurance domains

Benefits



Increase Net Promoter Score with satisfied customers.



Higher lead conversion ratios through focused sales



Increased customer retention with personalized strategies



Higer advisor productivity with automated tasks

Built on AWS, and years of LTI Mindtree's Insurance experience, Advisor of the Future can elevate the advisors and create true differentiation.



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