



CONNECT Modernize your ability to harness, leverage and monetize

Digital Core as a Service

Modernize how your brokerage harnesses data without building infrastructure.

Why It Matters

- Your AMS and operational systems hold valuable insights that are difficult to access.
- Siloed data limits visibility into performance, pricing, and growth.
- Brokers need enterprise-grade analytics without enterprise-level IT lift.

What You Get

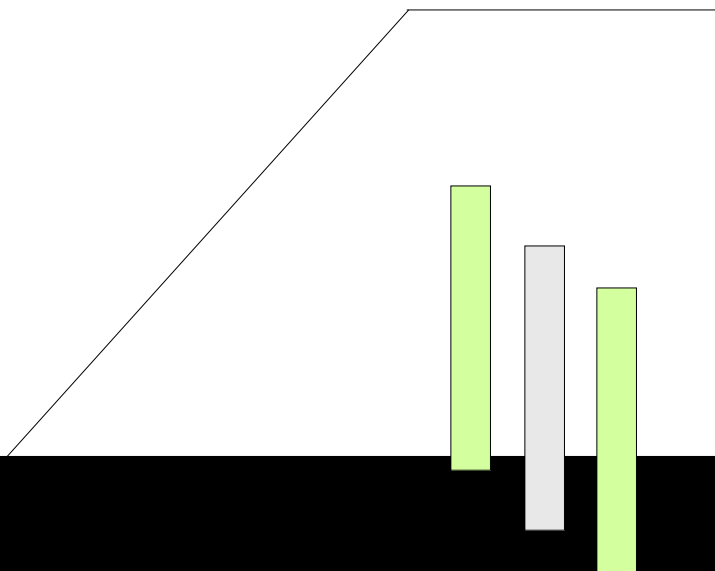
- Unified, secure data foundation built for brokers
- Structured, high-quality data ready for analytics and automation
- Dedicated BrokerPRO data engineering and analytics support

How It Works

1. Connect AMS and key data sources into a secure environment
2. Improve data quality and integrate across systems
3. Power analytics, digital products, and automated workflows

Ready to transform your brokerage into a **data-driven powerhouse?**

[Click to Explore the PRO Suite](#)





AUTOMATE Increase your firm's effectiveness with digital agents

GenPRO

A private, insurance-trained AI that works like a teammate.

Why It Matters

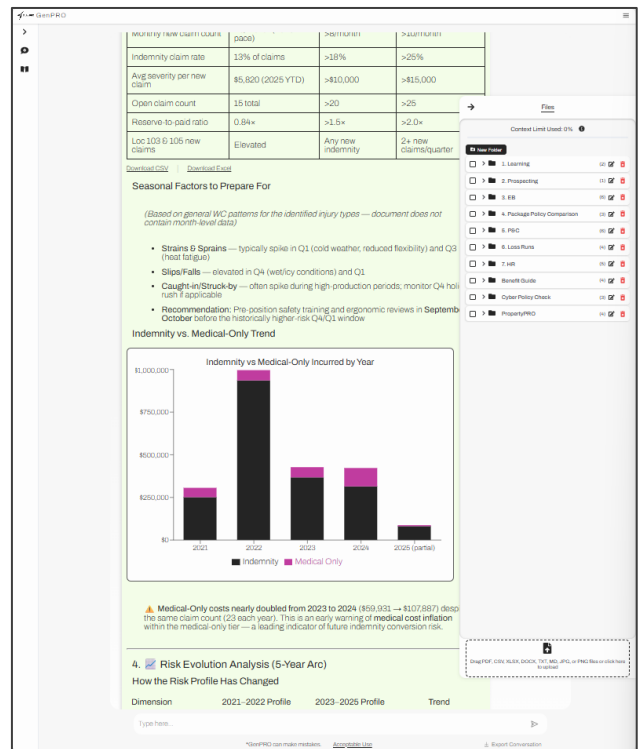
- Brokerage teams lose hours to manual, repetitive work.
- Public AI tools raise data security concerns.
- Complex documents slow decision-making.

What You Get

- Private generative AI built specifically for insurance
- Advanced reasoning across documents, data, and workflows
- Time savings across sales, service, risk, and marketing
- Secure architecture hosted on AWS

How it Works

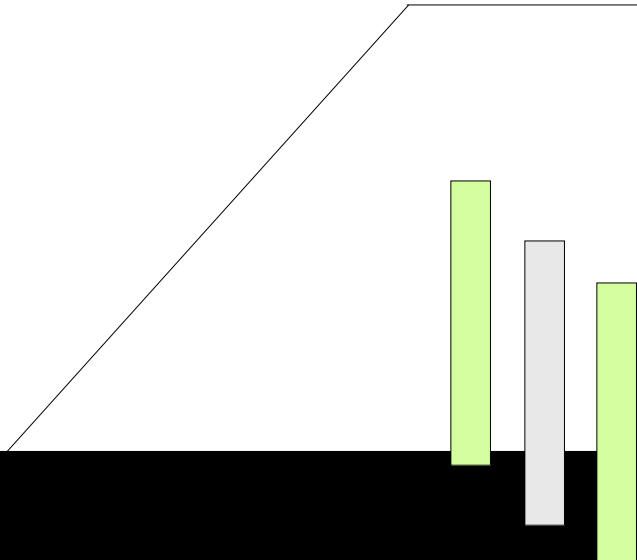
1. Upload documents or ask questions
2. GenPRO analyzes, reasons, and delivers output
3. Export insights directly into client-ready materials



Ready to transform how your team works?



Click to Explore the PRO Suite





AUTOMATE Increase your firm's effectiveness with digital agents

StewardshipPRO

Transform stewardship meetings from reports into experiences.

Why It Matters

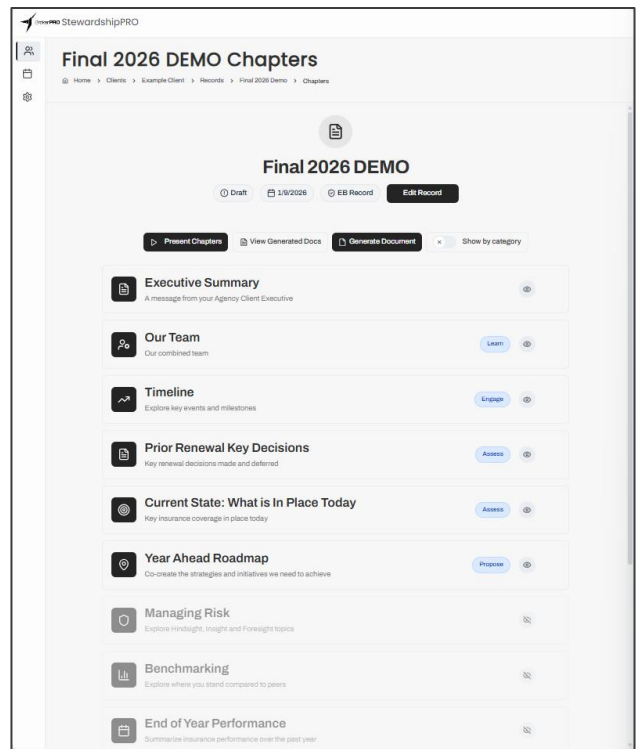
- Traditional stewardship reports are time-consuming and underused.
- Clients want forward-looking conversations.
- Brokers need a clear way to demonstrate value.

What You Get

- AI-generated timeline of annual accomplishments
- Interactive, digital stewardship experience
- Dramatically reduced prep time
- Features for forward-looking strategy and planning

How It Works

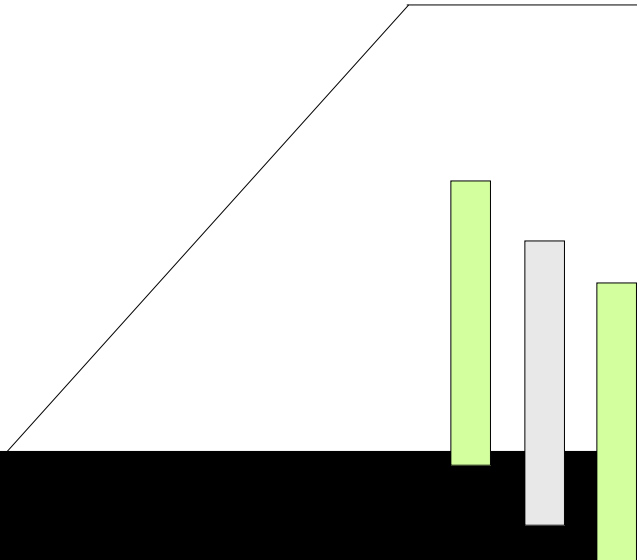
1. Visualize client activity data
2. AI organizes accomplishments into a timeline
3. Use live in meetings to guide strategy



Ready to redefine client stewardship?



Click to Explore the PRO Suite





BENCHMARK Grow using high-quality, trusted national benchmarks

Total Cost of Risk

Real-time visibility into insurance cost drivers.

Why It Matters

- Outdated spreadsheets slow down advisory conversations.
- Current benchmarks create stronger client recommendations.
- Clean visuals increase confidence in meetings.

What You Get

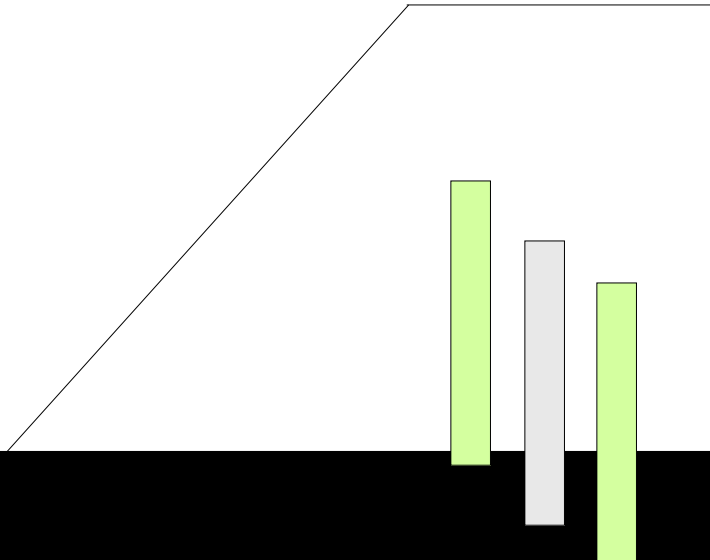
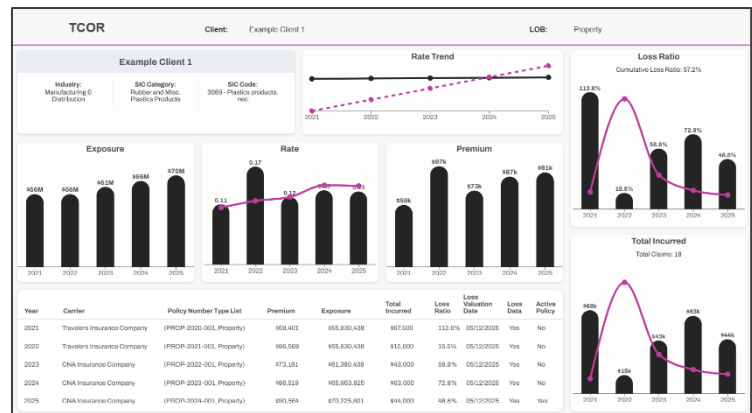
- Real-time exposure, premium, and rate trend insights
- Benchmarks against peers and industry groups
- Presentation-ready charts and dashboards

How It Works

1. Data refreshes multiple times per day
2. Trends benchmarked against trusted datasets
3. Client-ready visuals exported instantly

Ready to deliver insights that **set you apart?**

Click to Explore the PRO Suite





BENCHMARK Grow using high-quality, trusted national benchmarks

Health Analytics

Clear, on-demand insights across employee health benefits.

Why It Matters

- Static reports limit understanding of plan performance.
- Benchmarking strengthens client strategy and negotiations.
- Benefits teams need fast, credible answers.

What You Get

- Insights across Medical, Dental, and Vision plans
- Peer and industry benchmarking
- Client-ready visualizations for meetings
- Trend analysis to support recommendations

How It Works

1. Access dashboards by benefit category
2. Compare plans against peers and benchmarks
3. Share visuals live or in presentations

Ready to elevate your benefits advisory game?

Click to Explore the PRO Suite

