

AI Automation Buying Guide

Efficient operations, improved customer engagement, and better fraud detection are just a few of the many advantages AI-driven workflows can deliver. At the same time, there are traps to avoid: regulatory issues, security lapses, and wasting resources on projects that don't yield results or take too long to deploy. Not just any AI partner can deliver the results you need. Use this AI automation checklist to navigate the road to insurance automation success. Does your partner check all the boxes?



Compliance and Regulations

- Follows the NAIC's Principles on Artificial Intelligence.
- Is ready for future regulation in accordance with the [latest executive orders](#) and proposals.
- Is compliant with [state privacy laws](#) and [AI-related legislation](#).
- Is HIPAA compliant.
- Is compliant with federal and state anti-discrimination laws.



Security

- Has SOC2 certification.
- Is PCI-DSS complaint.
- Uses role-based access controls.
- Utilizes version management.
- Leverages project-based permissions.
- Encrypts all data, including third-party data.
- Encrypts integration credentials, both in transit and at rest.
- Never co-mingles your data with that of other customers.



Voice AI

- Handles recording, transcription, analytics and reporting to ensure call quality.
- Includes scores that allow you to fine-tune voice agents.
- Offers multilingual customer service support.
- Can resolve around 80% of calls without a transfer.
- Facilitates warm transfer or logs information for issues requiring human support.
- Provides both inbound and outbound call support.
- Enables unlimited scalability.



Omni-Channel Support

- Provides seamless experiences via voice, digital, SMS and email.
- Integrates with other systems, such as policy administration and claims.
- Automates the FNOL process.
- Triages incoming communications.
- Provides a seamless policyholder experience across channels.



Speed to Market

- Offers an AI automation platform that seamlessly integrates with your IT ecosystem.
- Has an agile model that is adaptable for different use cases.
- Provides ready-to-go shell agents with pre-configured workflows and tools.
- Deploys in weeks, not months.



Insurance-Centric Focus

- Caters to insurance industry needs (underwriting and claims).
- Brings tribal knowledge to projects, expediting progress and reducing impact on client's IT resources.
- Understands insurance industry regulations.
- Follows insurance industry security standards.



Synthesis

- Integrates with your IT systems.
- Provides APIs and integrations for your vendors.
- Integrates with analytics to provide insights.
- Integrates with claim service providers, such as lawyers, body shops, and contractors.



Structured data

- Pulls data from your FNOL to power analytics.
- Provides clean, structured, accurate data to reduce manual entry while increasing corporate intelligence.



Agility

- Simplifies maintenance with configuration instead of code.
- Has measures in place to mitigate the risk of AI hallucinations.
- Automates translation to overcome language barriers.

Wondering how Liberate stacks up?

We check all these boxes, providing everything you need to reap the rewards of automation. Don't settle for less.