

GhostDraft Originate

One source of truth for policy wording and customer communications



GhostDraft Originate is a collaborative, centralised platform for drafting, reviewing and managing all your policy wording, templates, clauses and approved content.

Purpose-built for insurance, banking and financial services providers, Originate streamlines the drafting, approvals and version control for customer and broker communications – with the content library giving product, underwriting and compliance teams a single source of truth for all content.

Originate transforms fragmented, manual content processes into structured workflows that accelerate product updates and eliminates version chaos while maintaining compliance and brand consistency.

From drafting new policy exclusions, to updating terms and conditions across multiple brands, or managing compliance reviews for product disclosures, Originate delivers the speed, control and collaboration your teams need.

Content and Template Library

Your single source of truth for all policy wordings, clauses and documents. Smart search, role-based views and full version history enable every team to instantly find and work from approved content.

Accelerate Drafting and Reviews

Give product, underwriting and compliance teams one place to collaboratively draft, review and update policy wordings, endorsements and product disclosures while staying compliant.

Mitigate Risk with Centralised Control

Know exactly what policy wording was in effect for every policy issued. Centralised version control and comprehensive audit trails give you the evidence to prove compliance and protect your business.

“We’re consistently looking for cutting-edge technologies that not only build strong customer experiences but also create operational efficiencies and drive cost savings. The GhostDraft solution will assist in this endeavour.” – **Sam Nkosi, Chief Information Officer, Santam**



400+ customers

in South Africa & North America



30+ years

developing document automation software

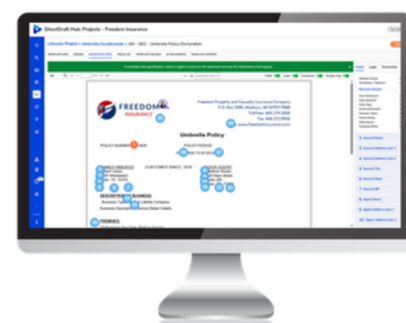


150+ insurance

and financial services customers

Organise content and documents across products, brands and brokers

- ✓ Accelerate onboarding with bulk import of legacy forms and documents
- ✓ Collaborate in real-time without email back-and-forth or version confusion
- ✓ AI smart search to easily find wording and templates across your library
- ✓ Reduce compliance risk with comprehensive audit trails and version history
- ✓ Document business and system requirements for integration into core systems



Take control of your policy wording and customer communications



Professional, personalised customer communications start long before documents reach customers. Originate manages the upstream content lifecycle – providing structure and control over how policy wording and templates are designed, governed and maintained. This upstream control accelerates product updates and launches, provides comprehensive version control and empowers business teams with reduced IT dependency.

Centralised Content and Template Library

Manage policy wording, clauses and approved content across product lines, brands and broker networks from a centralised library with smart search. Ensure every document meets regulatory and brand requirements.

- ▶ Store and organise all your templates, clauses and customer communications in a searchable library
- ▶ AI-assisted smart search approved wording and clauses across your entire library to accelerate drafting
- ▶ Maintain complete audit trails with role-based access controls to ensure regulatory compliance
- ▶ Link related documents, endorsements, and variations to understand impacts before making changes

Accelerate Drafting, Reviews and Approvals

Draft, review and update policy wording, clauses and customer communications in an intuitive Microsoft Word environment. Reuse approved language, compare versions side-by-side and collaborate across teams.

- ▶ Draft and edit templates directly in Microsoft Word with smart search access to your content library
- ▶ Collaborate across teams in real-time with tracked changes, comments and redline comparisons
- ▶ Intelligent document comparisons highlight wording differences to accelerate compliance reviews
- ▶ Automated versioning and structured approval workflows provide comprehensive audit trails

Streamline Requirements and Specifications

Capture template requirements and business rules in a collaborative environment designed for business analysts and non-technical users. Create specifications with linked documents, reusable data dictionaries and complete change tracking – accelerating template development.

- ▶ Bulk import requirements from various formats to auto-create organised specifications
- ▶ Capture business rules and logic with standardised specifications linked directly to templates
- ▶ Build reusable data dictionaries to standardise development and eliminate rework of connected templates
- ▶ Track all requirement changes with full version history for handoff to development teams



GhostDraft 360: All-in-One Communications Platform

GhostDraft Originate is the upstream component of **GhostDraft 360**, our end-to-end customer communications management suite.

While Originate empowers business teams to research, design and specify customer communications, GhostDraft Activate enables IT teams to automate, test and deploy those communications for real-time generation and delivery.

Together, they provide complete lifecycle management — from initial template drafting through to omnichannel customer delivery.



Simplify the creation and management of your documents and customer communications, including:

- Application forms
- Quotes
- Policy schedules
- Broker communications
- Claims communications
- Home loan agreements
- Credit agreements
- Wills and Trusts
- Beneficiary distribution statements
- Investment agreements
- Fund fact sheets
- Employee benefits communications
- Marketing and product brochures
- And more ...

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GhostDraft is a highly-focused CCM provider with a strong track record in the insurance space.

Aspire Leaderboard CCM Software 2025

Leading industry analyst, Celent, recognise GhostDraft as a Technology Standout for its CCM capabilities.

Celent CCM Vendor Report 2024

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Locally developed. Globally trusted.

GhostDraft is proudly South African technology, locally developed and globally trusted. Our teams provide local implementations and 24/7 technical support with deep domain expertise in insurance and financial services.

Our 100% implementation success rate includes enterprise implementations at South Africa's largest insurers. Customers also benefit from unlimited document generation, Rand-based subscription pricing and B-BBEE Level 2 accreditation.

24/7 Support

All-inclusive SaaS Pricing

B-BBEE Level 2