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Product Update: Equisoft/amplify

Product Update



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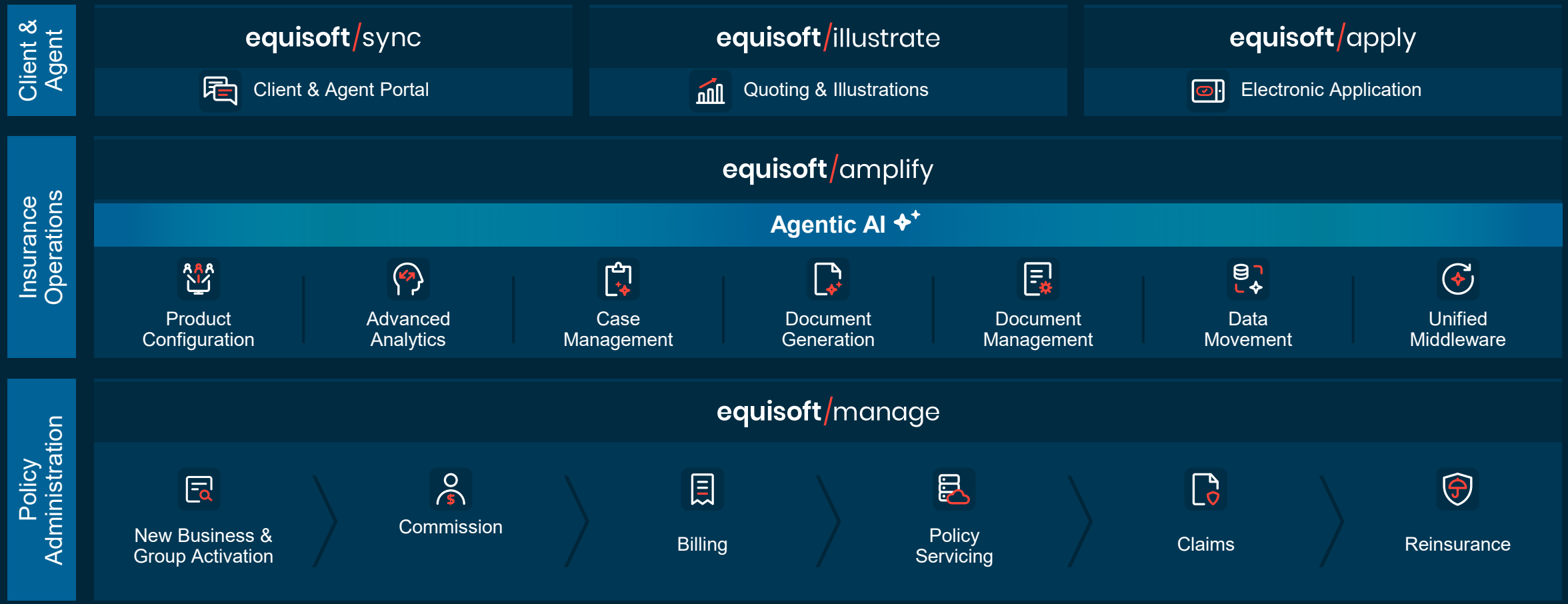
Ghassan Karam
ASA, ACIA

AVP, Product Management

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Insurer NextGen Product Suite
Equisoft Insurance Platform



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Equisoft Earns XCelent Award for Advanced Technology



In Celent's Policy Administration System Reports, Equisoft was recognized for its integration capabilities, agentic AI innovation, and comprehensive functionality spanning from illustrations through claims.

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What if your operations kept up with your ambition?



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The bottleneck used to be people. Now It's The Technology.



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Click here to watch the Equisoft/amplify Case Management video



Case Management Module

New

Real case management, finally agentic



Fully Agentic AI-enabled, powered by Agentic Services



New UI and interactive user experience



Pre-built workflow templates tailored to the user



Configuration layer built on self-sufficiency ; no proprietary language

Purpose-built for **Life & Annuities**

Grounded in **30 years** of market experience

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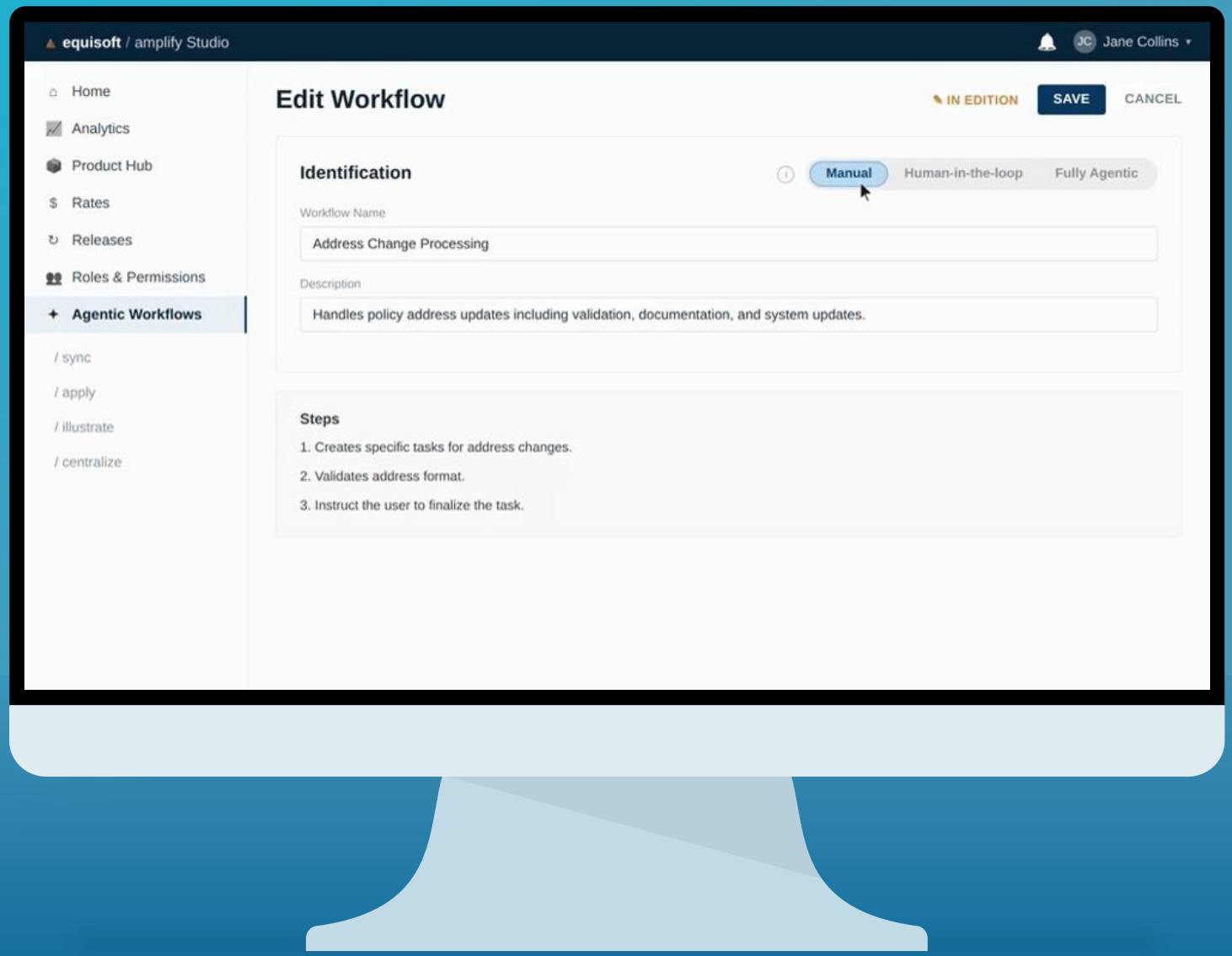


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Equisoft/amplify

- Fully Agentic
- Human in the loop
- Manual



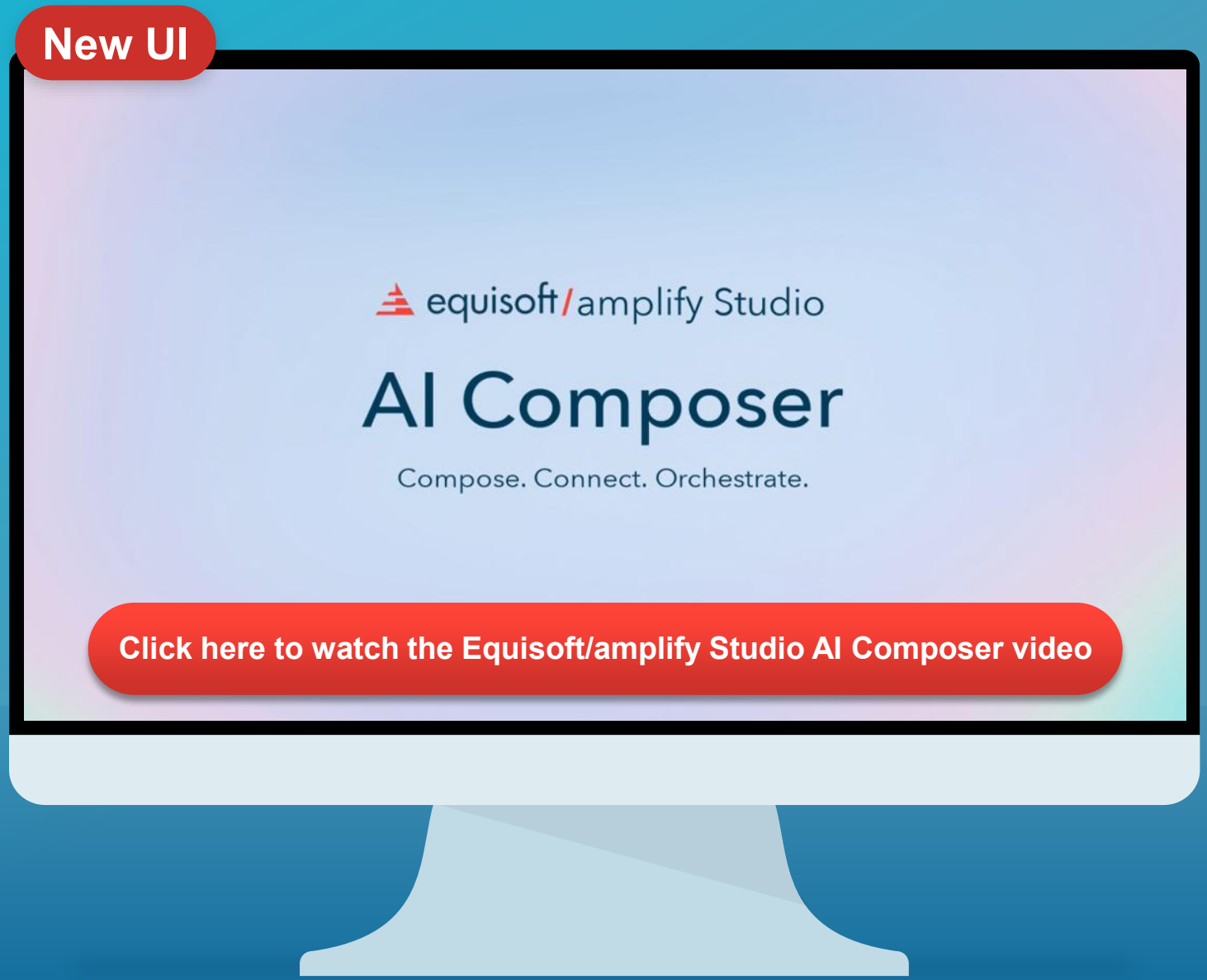
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Equisoft/amplify

Agentic Composer

- Create Agents
- Design Workflows
- Test & Iterate



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The insurance org chart is evolving

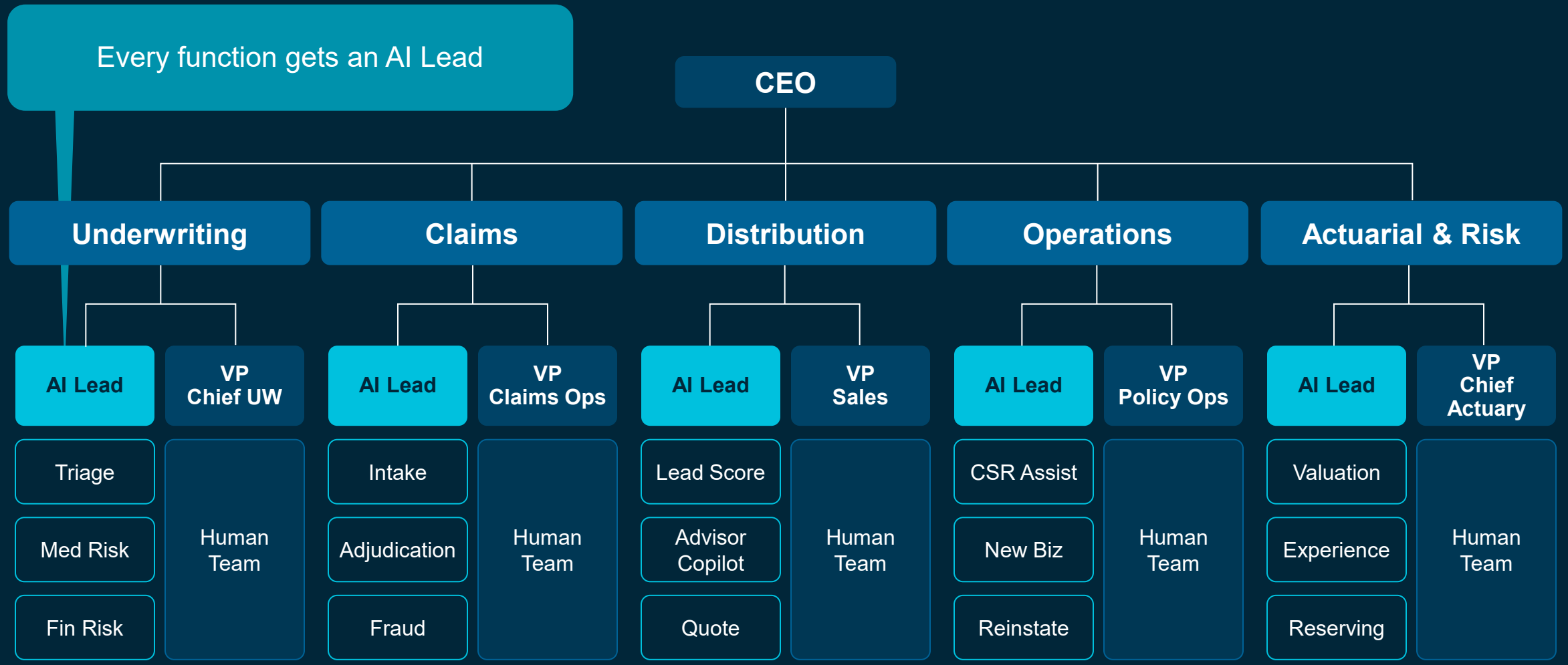
So is the bill!



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The insurance org chart is evolving



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Token economics: manageable, not mysterious



AI billed by the token

Unmanaged

Cost becomes a surprise

- Free in demos, costly at scale
- Volume blows up the budget
- Chatty workflows drain spend
- No cost visibility per decision

Designed for scale

Cost becomes a lever

- Predictable cost/transaction
- Right model for each task
- Leaner prompts, lower spend
- Measurable AI ROI

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Introducing Amplify Agentic Store

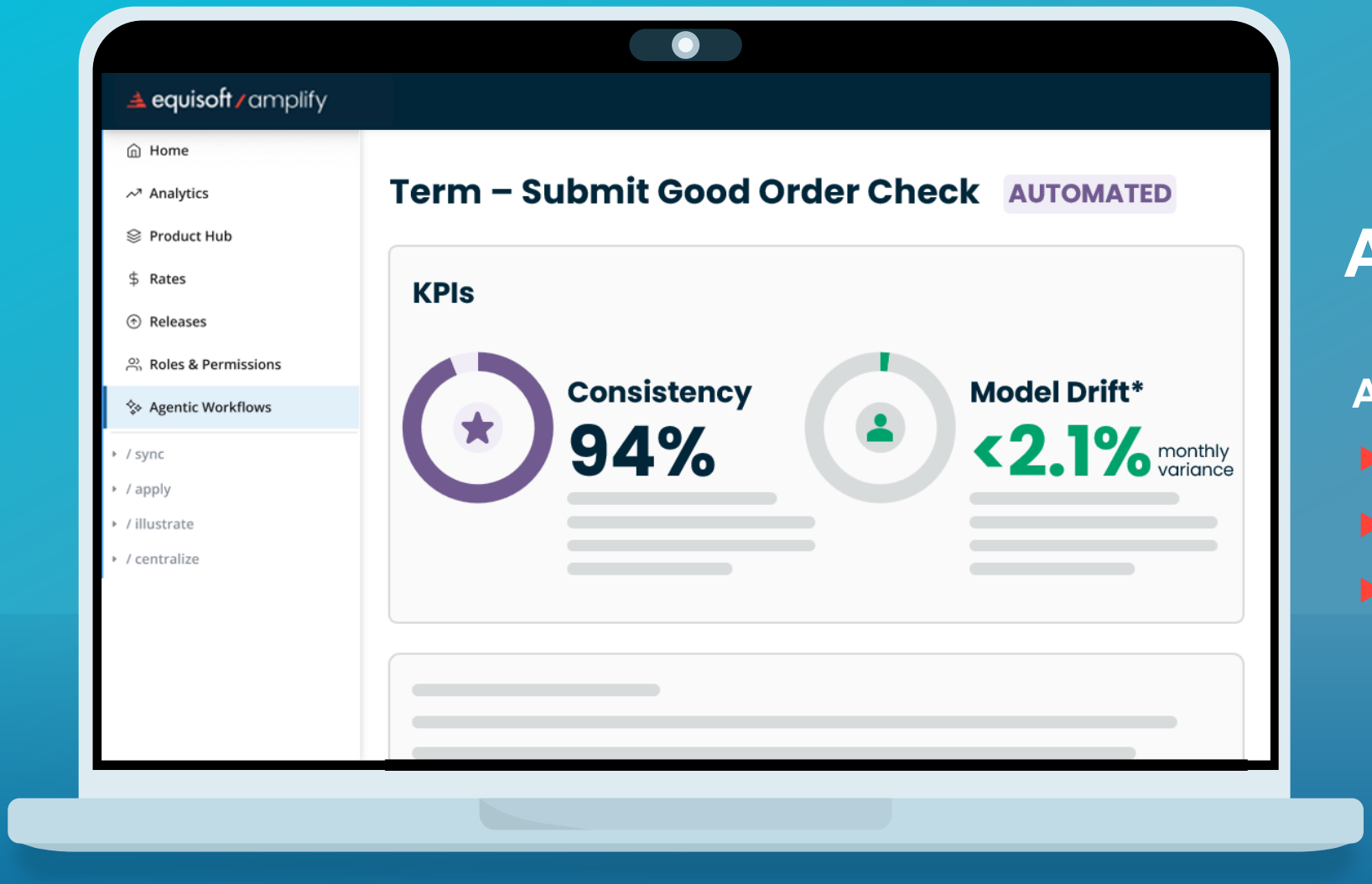
Accelerate your AI Transformation

- Immediate release of agents and workflows
- Pre-analyzed: the right model for the right job
- Granularity: single agent or full agentic workflow



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AI Health Monitoring

Against Your Baseline

- Consistency: 94% ✓
- Drift: Normal ✓
- Granular Control Panel

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What if your baseline needs to evolve?



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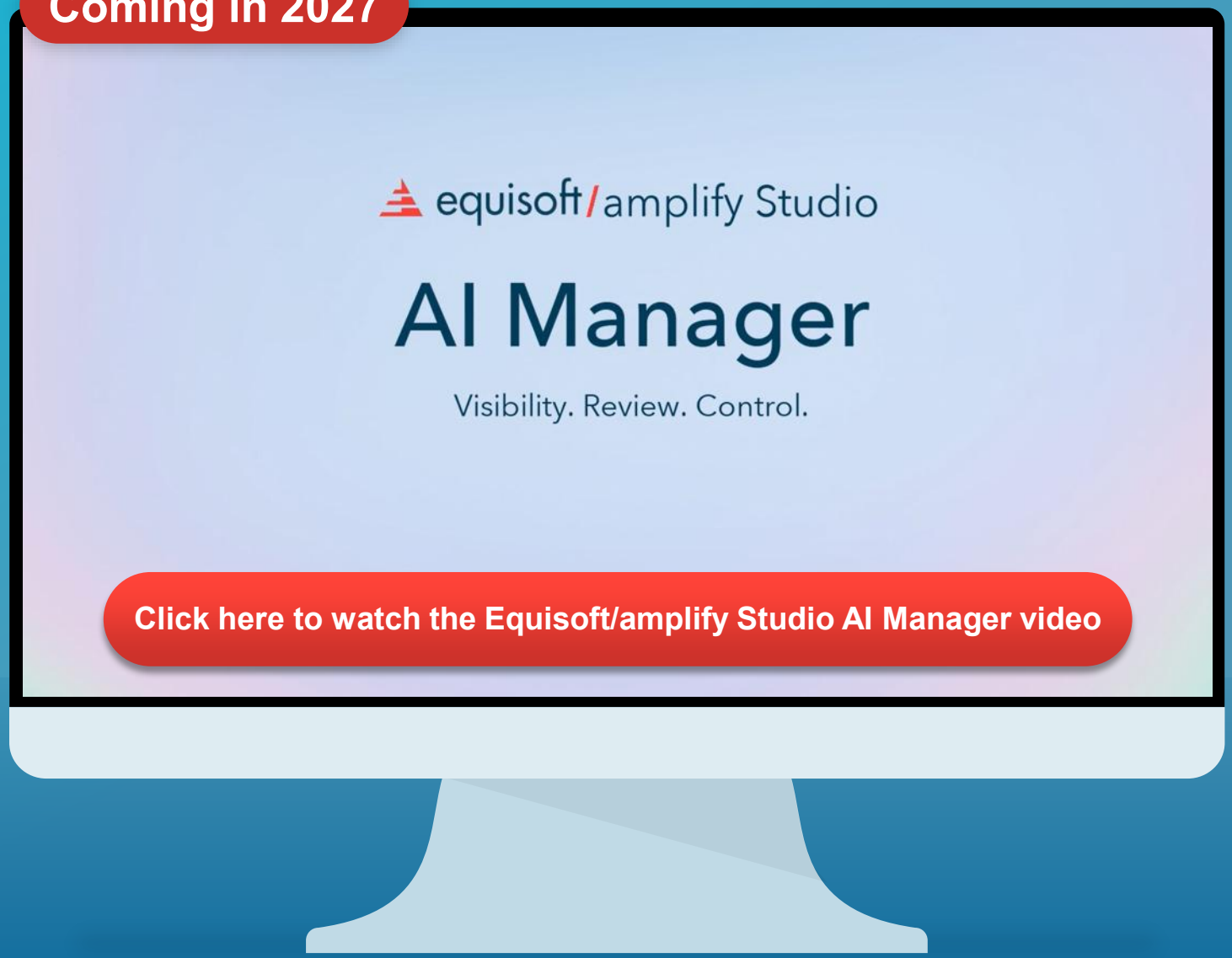
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Introducing the AI Manager

Built for your business function AI leads

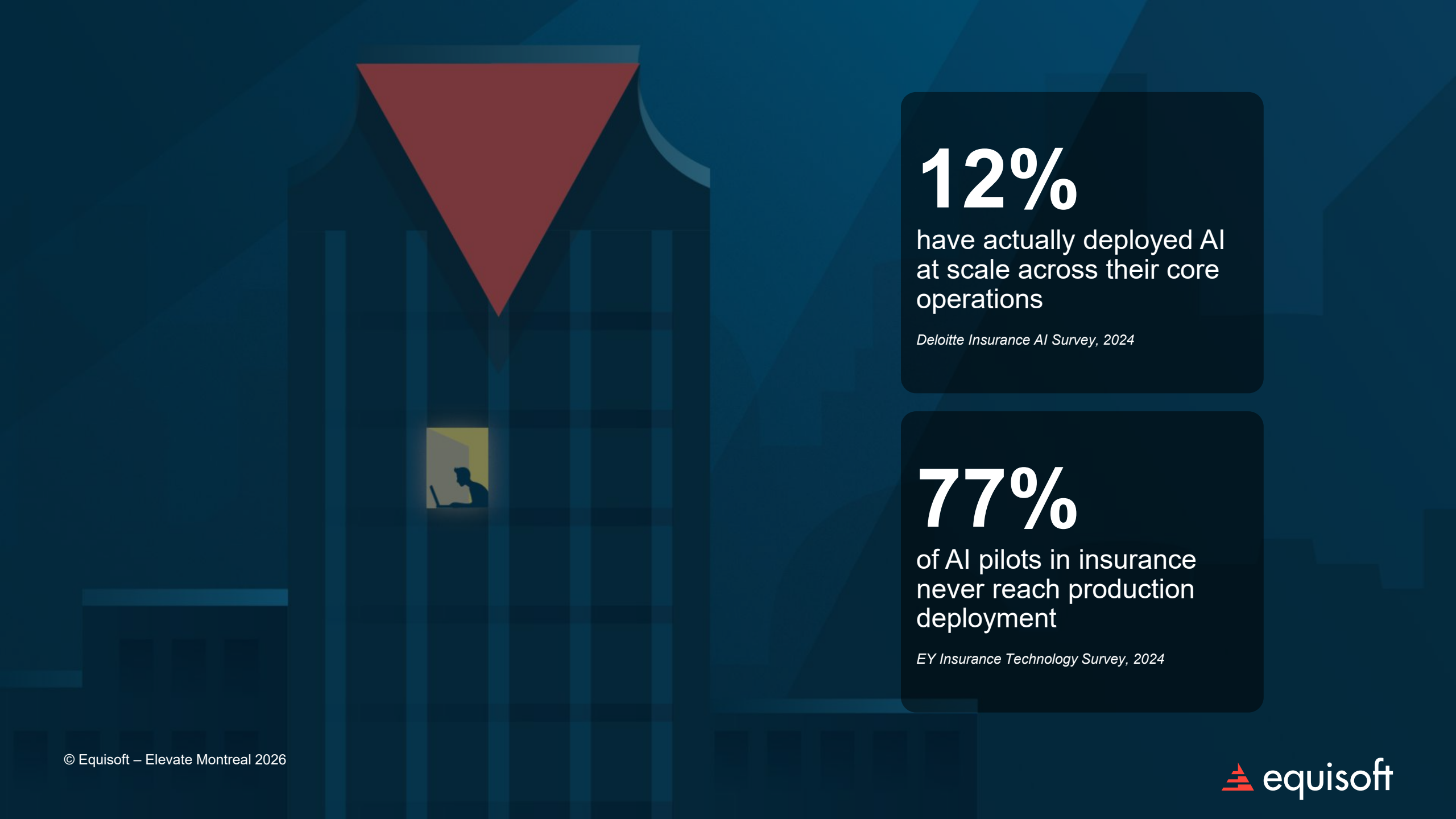
- Supervise agent performance
- Feedback to AI
- Business needs and AI actions aligned

Coming in 2027



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12%

have actually deployed AI at scale across their core operations

Deloitte Insurance AI Survey, 2024

77%

of AI pilots in insurance never reach production deployment

EY Insurance Technology Survey, 2024

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Why not just plug in a generic AI?

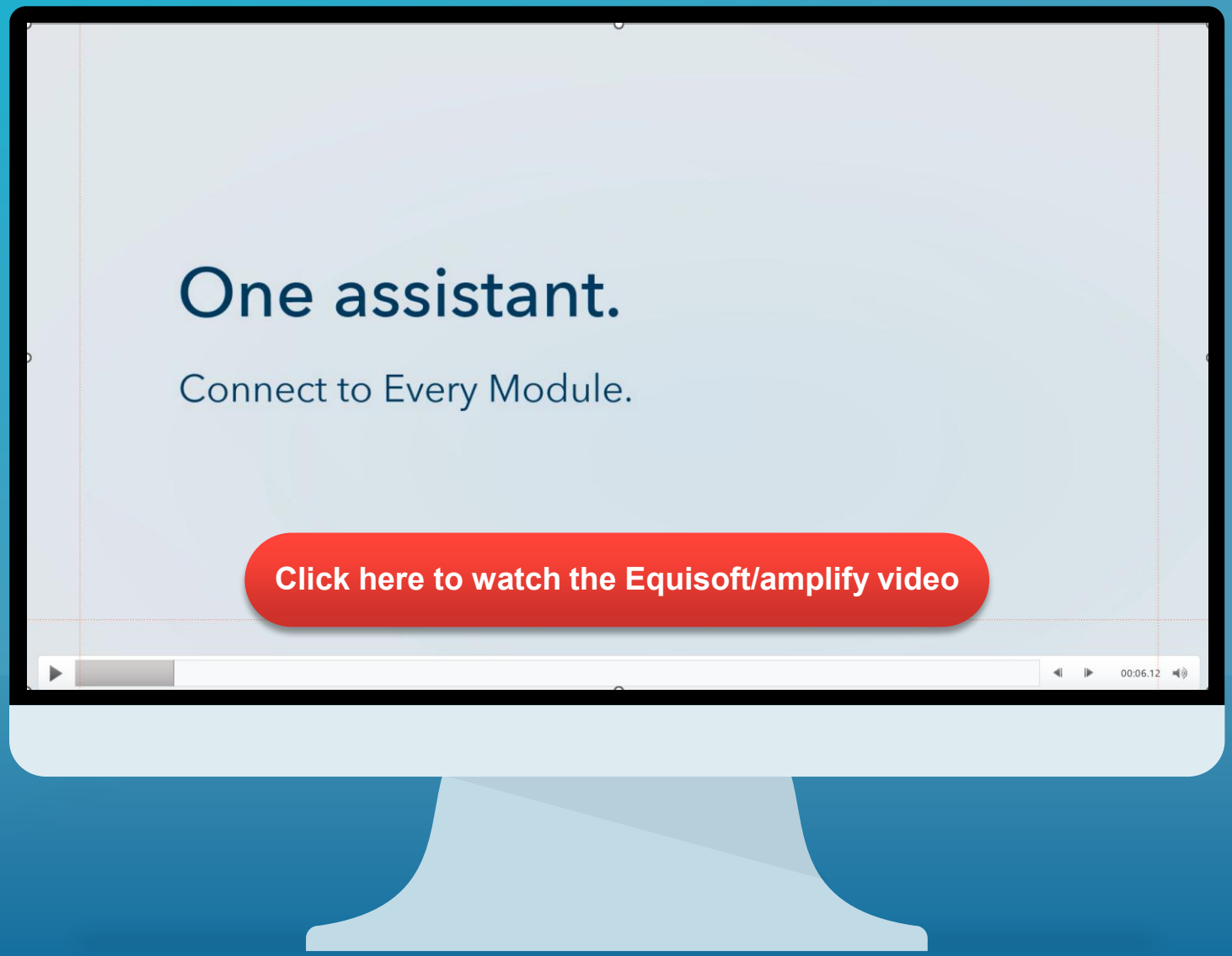
Generic models don't know your products, your rules, or your regulators.

Generic AI	equisoft/amplify
Trained on the open internet	**Trained on 30 years of insurance data**
Guesses at your product rules	**Grounded in your actual products & policies**
Unmonitored, hard to govern	**Governed and monitored by Agentic Services**
Unpredictable token costs	**Pre-optimized model selection, built-in**

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Equisoft Agent – Coming up in 2027



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Be a part of the journey!

Help us name our agent

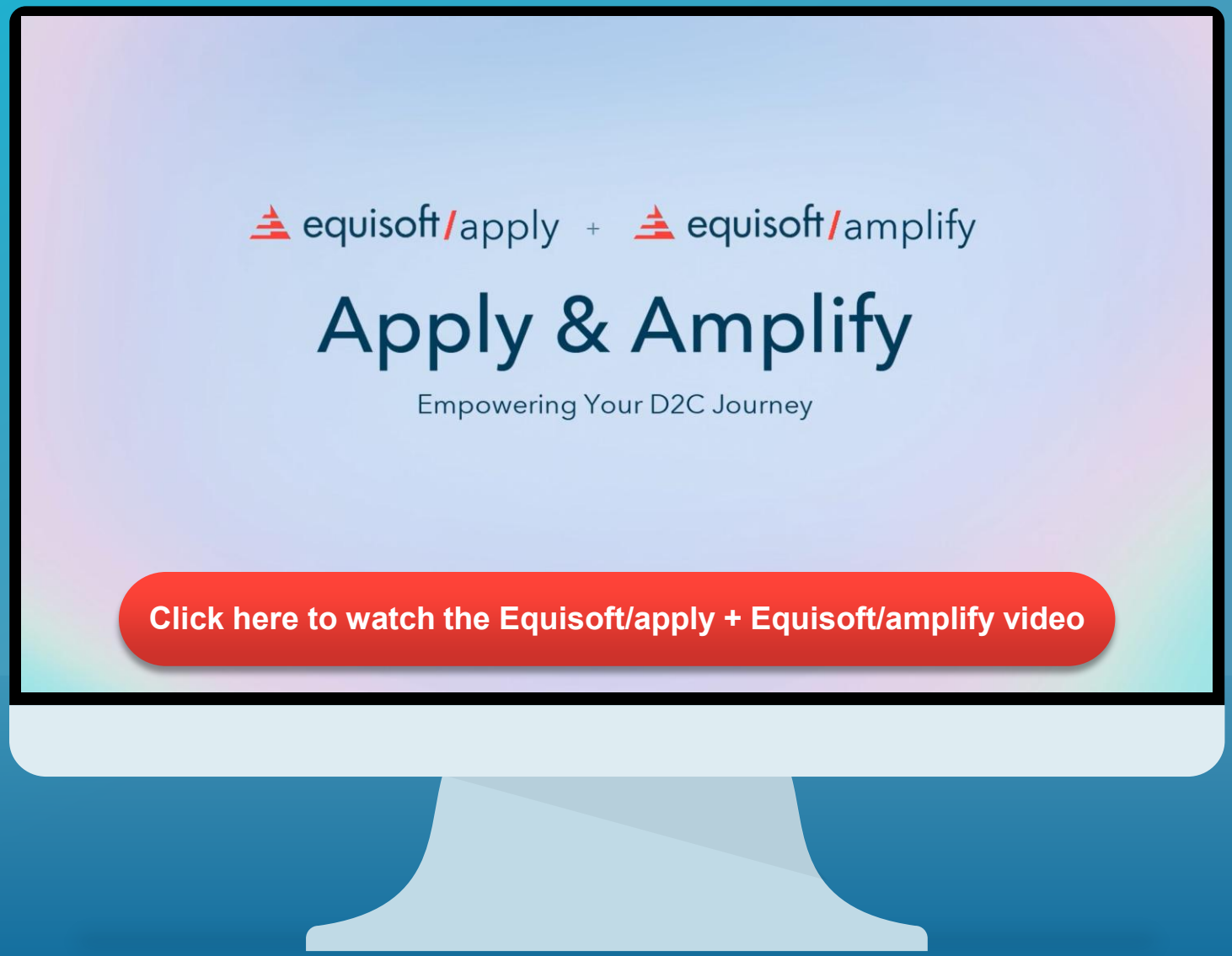


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Leading the D2C charge

- Quick & direct customer Interaction
- Fewer drop-off, faster completion
- Quick iteration on offers to meet business requirements
- D2C-ready front end



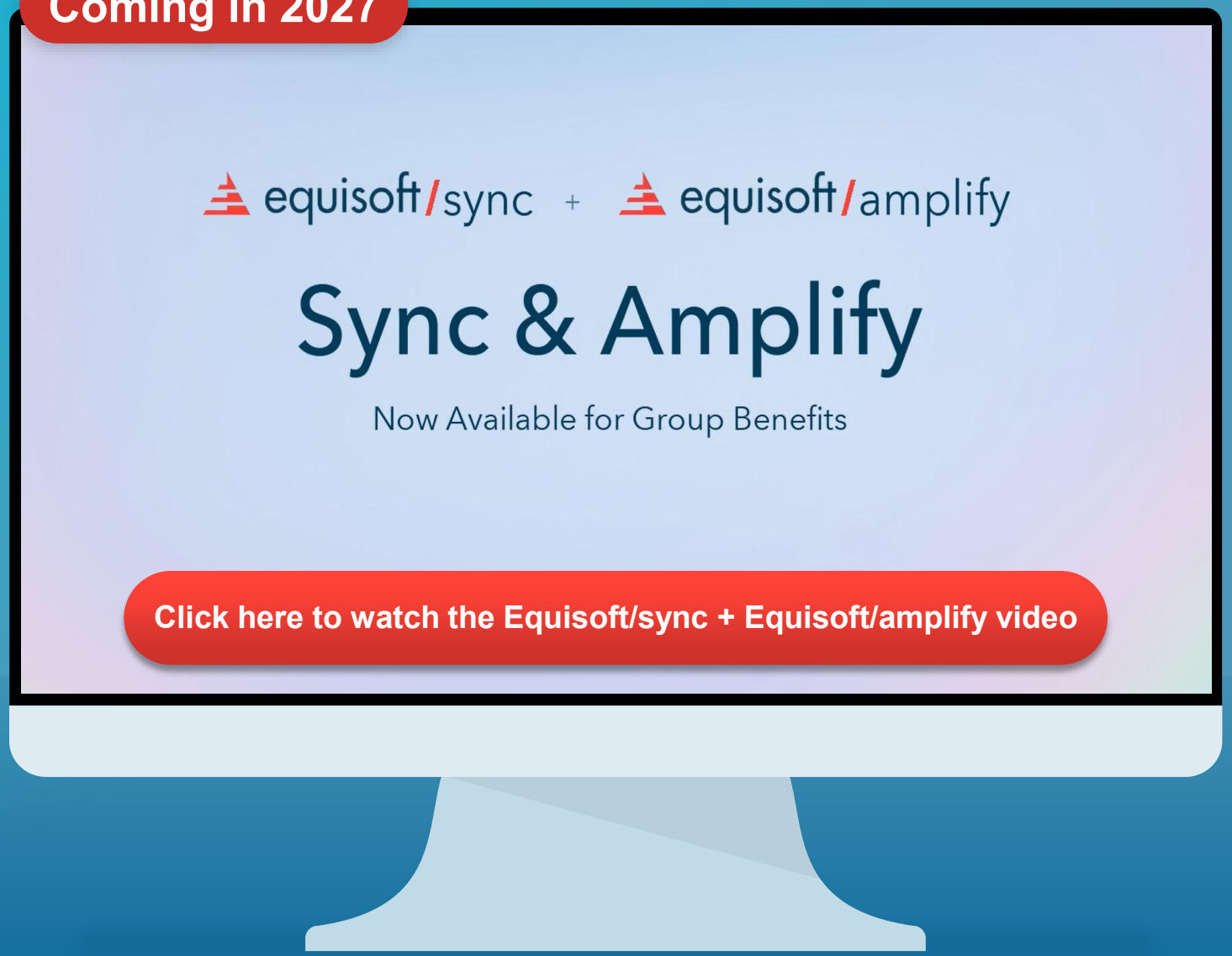
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Group Benefits Digital Suite

- Setup your plan & sponsor
- Portal for brokers, sponsors & members
- Improves experience while reducing cost

Coming in 2027



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In 2027 the AI agent will join with Equisoft/illustrate

equisoft/illustrate



Agents compare scenarios side-by-side





The agent drafts the client follow-up email — **right from the illustration**

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Equisoft /design

- Prompting Replaces Coding
- Requirements Become Configuration
- Further Cuts Execution

Coming in 2026



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Your independence. Amplified.

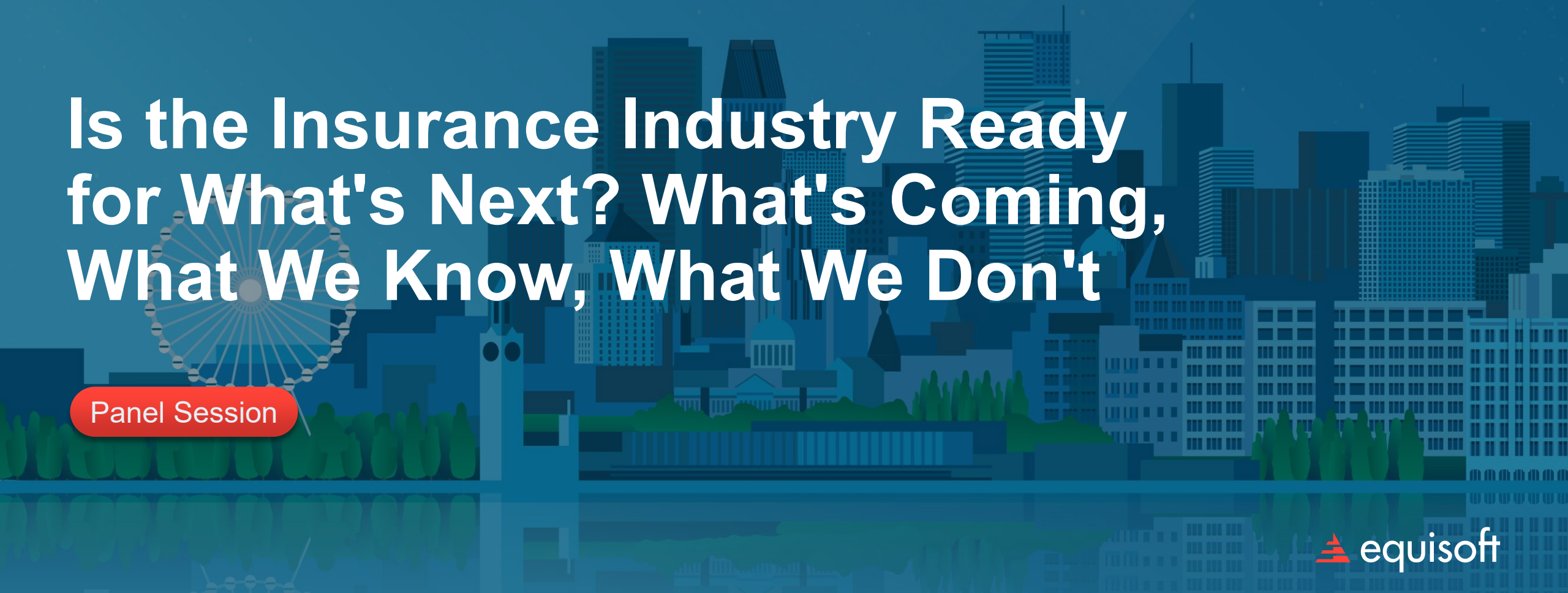
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Is the Insurance Industry Ready for What's Next? What's Coming, What We Know, What We Don't

Panel Session



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Bill Winicaties

Moderator,

Equisoft



Juan Mazzini

Global Head

CELENT



Paul Mattern

Senior Principal

datos INSIGHTS

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How is this new wave of technology changing the business model itself?



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How will distribution be affected?



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How are carriers operating and servicing that changing business model?



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How do we need to develop and deliver differently as a result?



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If you were to start a new insurance company today, what would it look like?

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Federated Insurance



Customer Session

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Lindsay R. Danks

IS Technology Manager

FEDERATED INSURANCE®



Luke Hartman

Systems Developer

FEDERATED INSURANCE®



William Becker

Senior Director, Business Analysis and Process Engineering, Equisoft

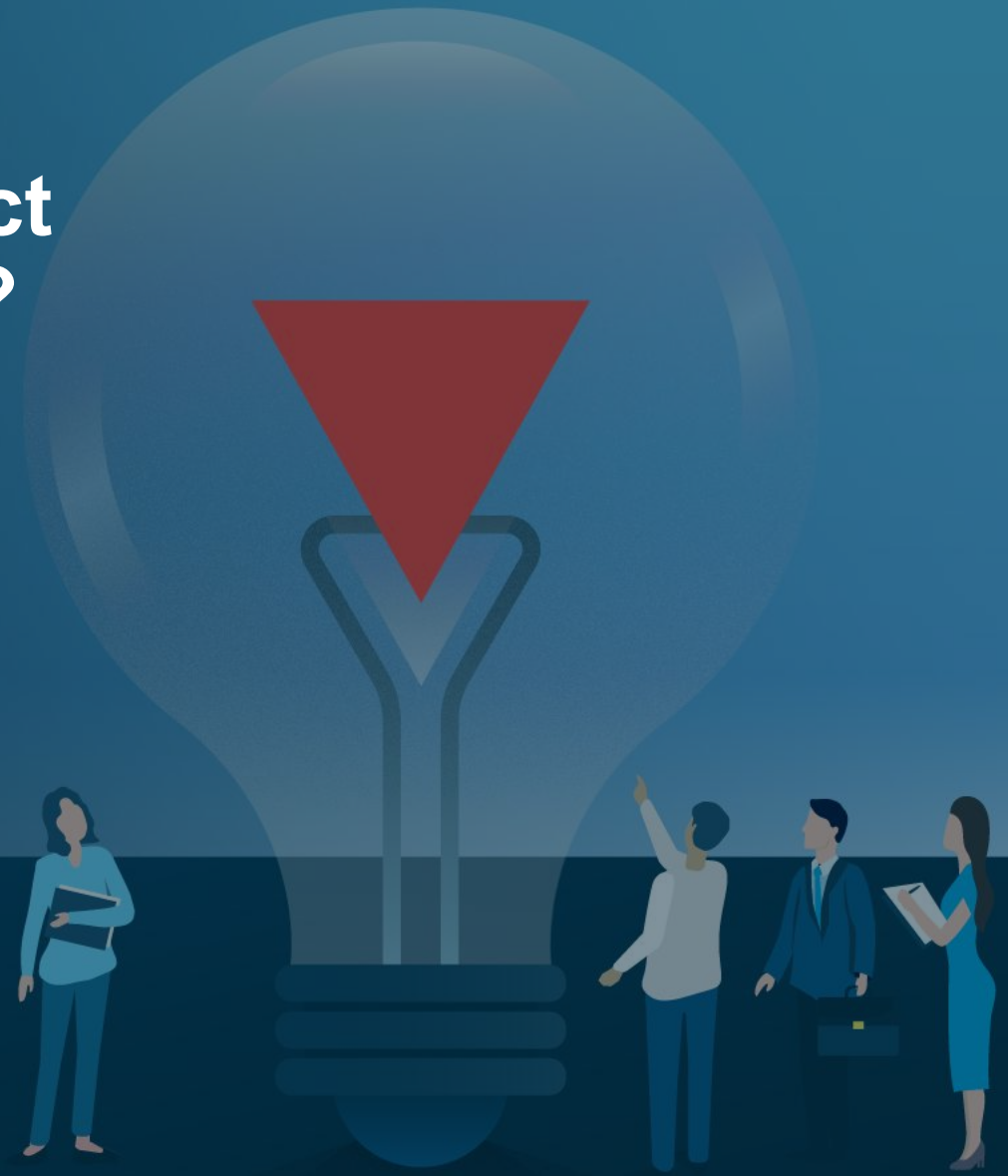
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What was the PolicyPro project including its scope and scale?

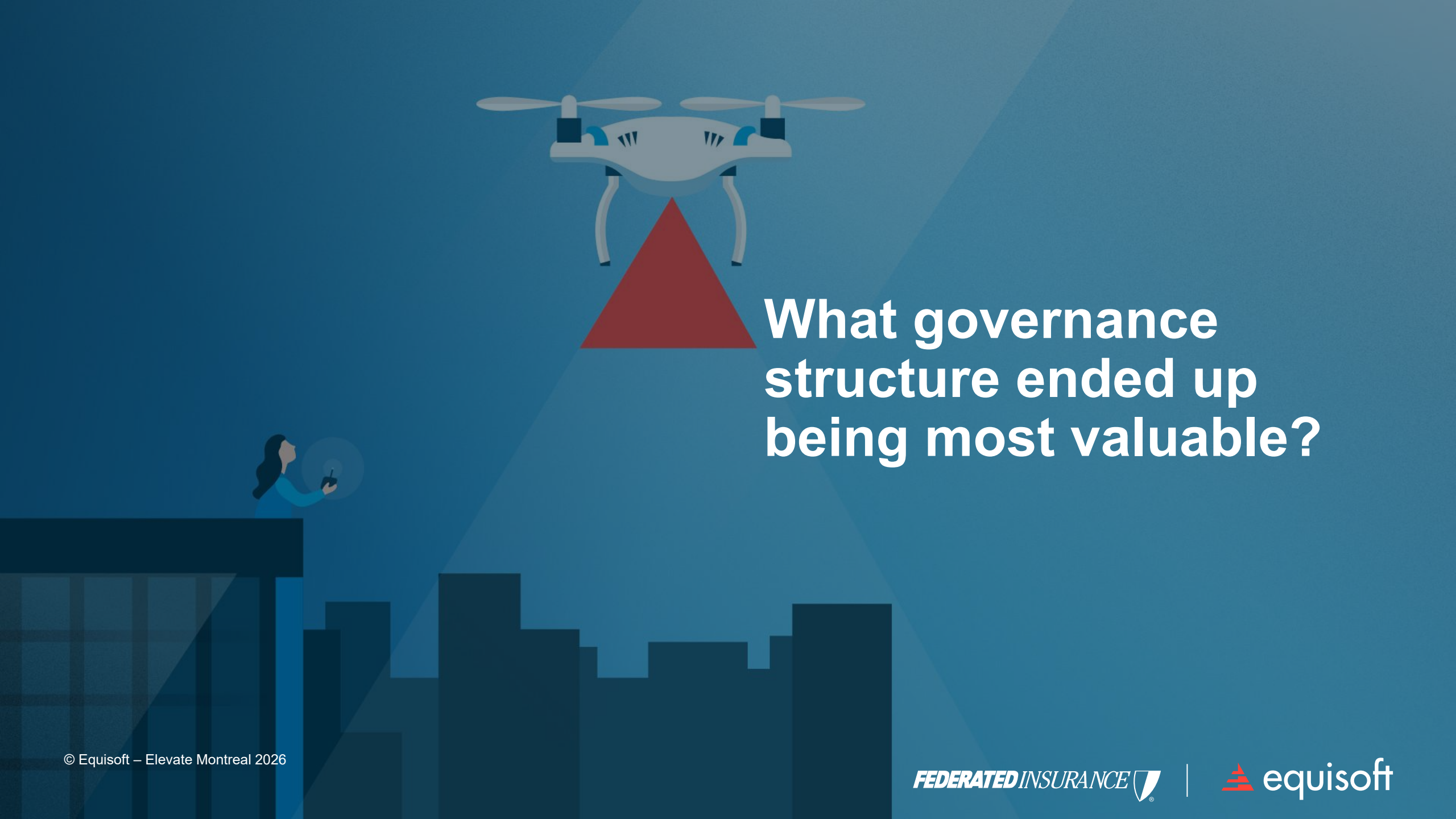
Why did Federated choose Equisoft?

What was your initial implementation approach and what made its implementation unique or challenging?



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FEDERATED INSURANCE | equisoft



What governance structure ended up being most valuable?

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At what point did Federated stop being a customer and start being an implementation partner?



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What was your biggest concern going into the project?

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What would we do differently (...if we did it again)?

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Ultimately, do you think this project was successful?



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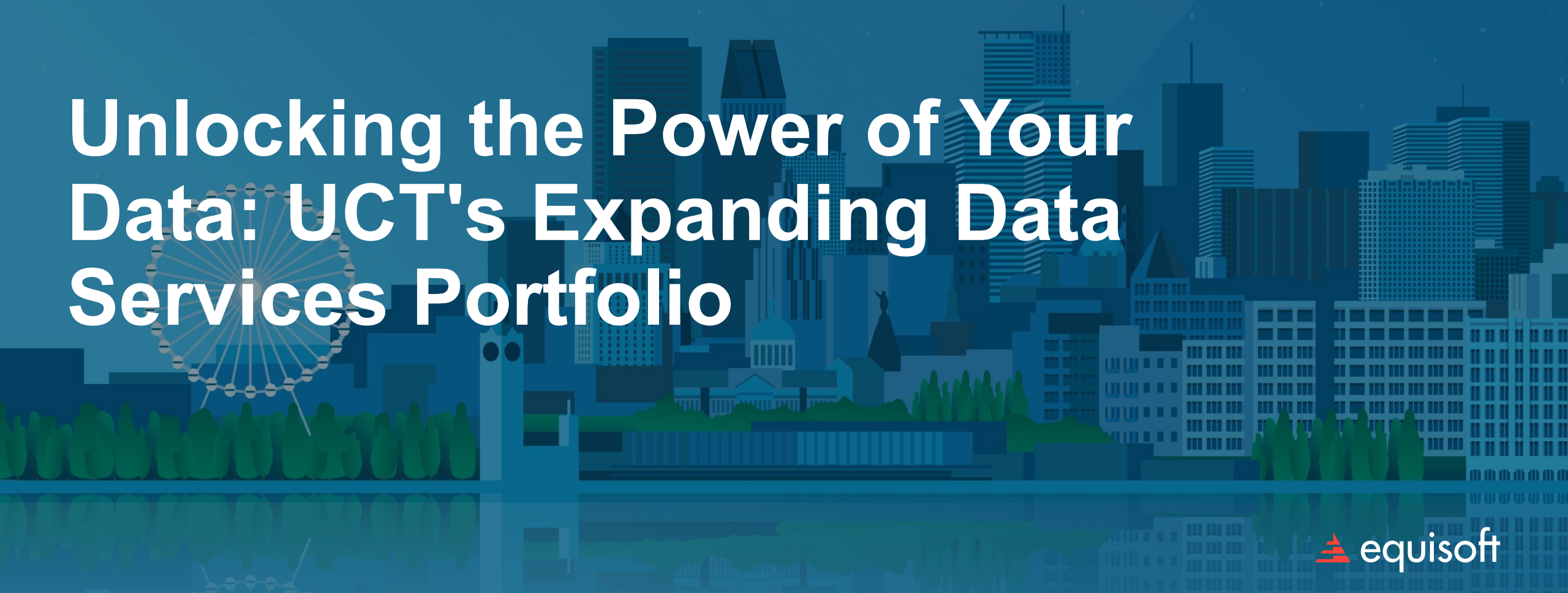
Is there anything we missed that you'd like to add?

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Unlocking the Power of Your Data: UCT's Expanding Data Services Portfolio



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Mike Allee

President, UCT

UCT

Smart Conversions. Smarter Data.

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What we'll cover today

- UCT – who we are and who we are becoming
- Closed-block challenge
- Integration & Equisoft/amplify
- The future of data use for insurance companies

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UCT's Data Practice Success in Results

400
successful projects

40%
Cost & timeline reduction

100%
Predictable outcomes

10%
Budget predictability (+/-)

20
Avg years of insurance experience

3-5
Typical project team size (vs 20+)

60+
Commercial systems migrated to/from

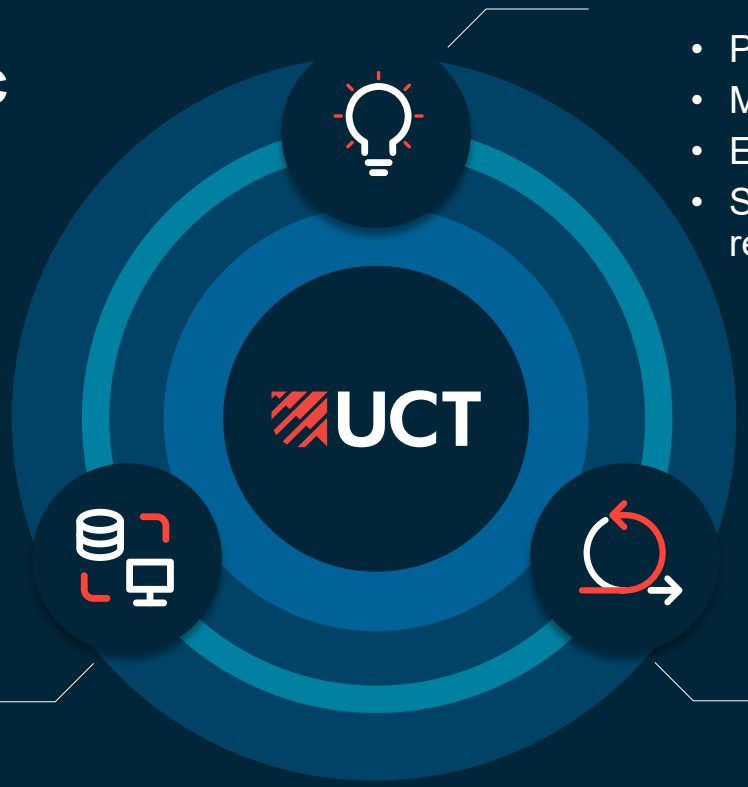
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Wholistic Approach to Data
The UCT Solution has 3 Equally Important Parts

Smart Tools – Data Centric

- Center of a transformation system that streamlines development, file management, data rules, reporting
- Embraces legacy technologies & proprietary data formats
- Multi-lingual; Multi-currency; Multi-Date format
- Can create Scripts for loading of known target system DBs
- Can load DIRECTLY to PAS DB
- Can conform to specific policy admin system transactions (if required)
- Neutral File or Customized model developed for use when needed (source at "arms length"



Smart people – Data Experts

- Prior App Development and product experience
- Multi-Line Experience – Group & Individual
- Expertise enables small teams with high impact
- Specialized recruitment and training in global regions

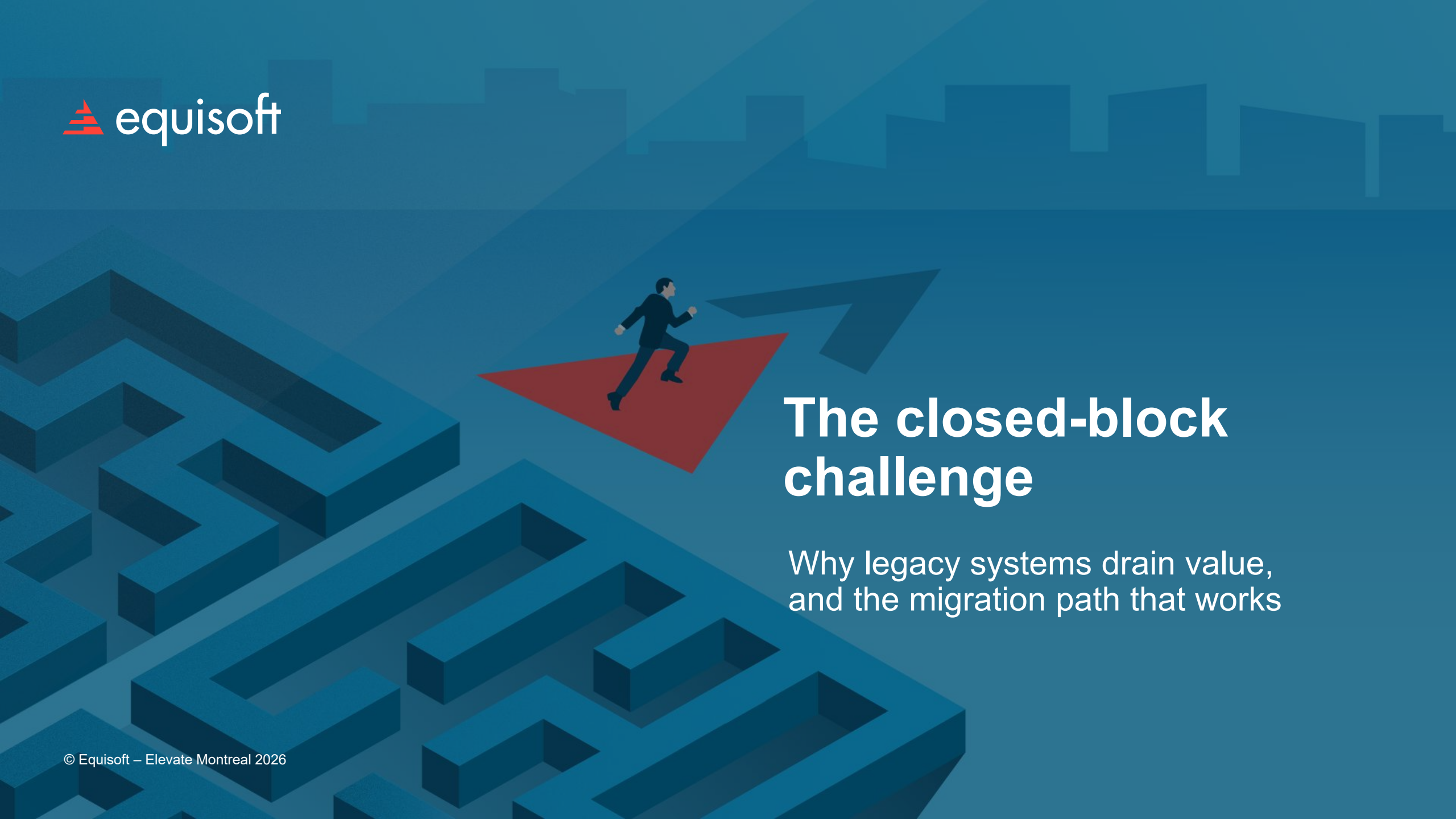
Smart Methods – Agility

- Evolve solution through repetition
- Start with known and ID unknown early in project rather than late
- Automate steps in transformation, load & file mgmt to support rapid iterations
- Supports industry standards (e.g., ACORD XML standard schemas)

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The closed-block challenge

Why legacy systems drain value, and the migration path that works

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The cost-covering capabilities of legacy blocks of business are far greater than new business being sold today, but are minimized by legacy systems.

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Migration to modern administrative platform: the right answer, done right

Advantages

- Modern, cloud-native platform
- Stronger compliance through advanced analytics
- AI automation/workflows for routine transactions
- Lower TCO over the long term

Challenges

- Higher upfront cost in years 1–2
- Lower operating cost existing staff or BPO
- Data migration risk without the right expertise
- Disruption to existing servicing teams

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Our solution:
Predictable path off your legacy systems

Balance IT outsourcing with real transformation

Leverage existing foundations



- Products, plans, transactions
- Reuse extensions, AsFile, etc.
- SQL extracts

+

Cloud hosting



- Include cycle and support
- Version upgrades
- Break fix

+

Fixed-cost migration to the platform



- Configuration of products
- Data transformation & loading

=

Predictable ROI and foundation for innovation



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The payoff: lower cost, less risk, more options best value for $ spent



Reduce long-term IT and project risk

- Proven Partner with credentials
- Fixed-cost implementation and migration
- Predictable per-policy annual charges



Lower cost than typical outsourcing

- Reuse existing integrations and extracts
- SaaS costs scale down as policies run off



More options for the future

- Consolidate active blocks on the cloud
- Run off, sell, or outsource on your terms



AI-optimized team performance

- AI handles the routine, so your team focuses on what matters
- Workflow intelligence that gets smarter as your business evolves

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Integration & Equisoft/amplify

Connecting legacy systems to agentic AI without a full migration



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Equisoft/amplify's AI modules

Modernize your data to unlock what's possible.



Data Movement
AI Powered capabilities



Analytics
Intelligent insights platform



Case Mgmt
Intelligent workflow layer with agentic AI



Product Hub
Product and rate changes across systems

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Product Hub - Integration use case



Product changes:
from months and $250,000
to **days** and **$15,000**



$15 million
in new revenue
between October and March,
from products that were
never possible before



Zero disruption
to the underlying
legacy systems

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Why this matters for you

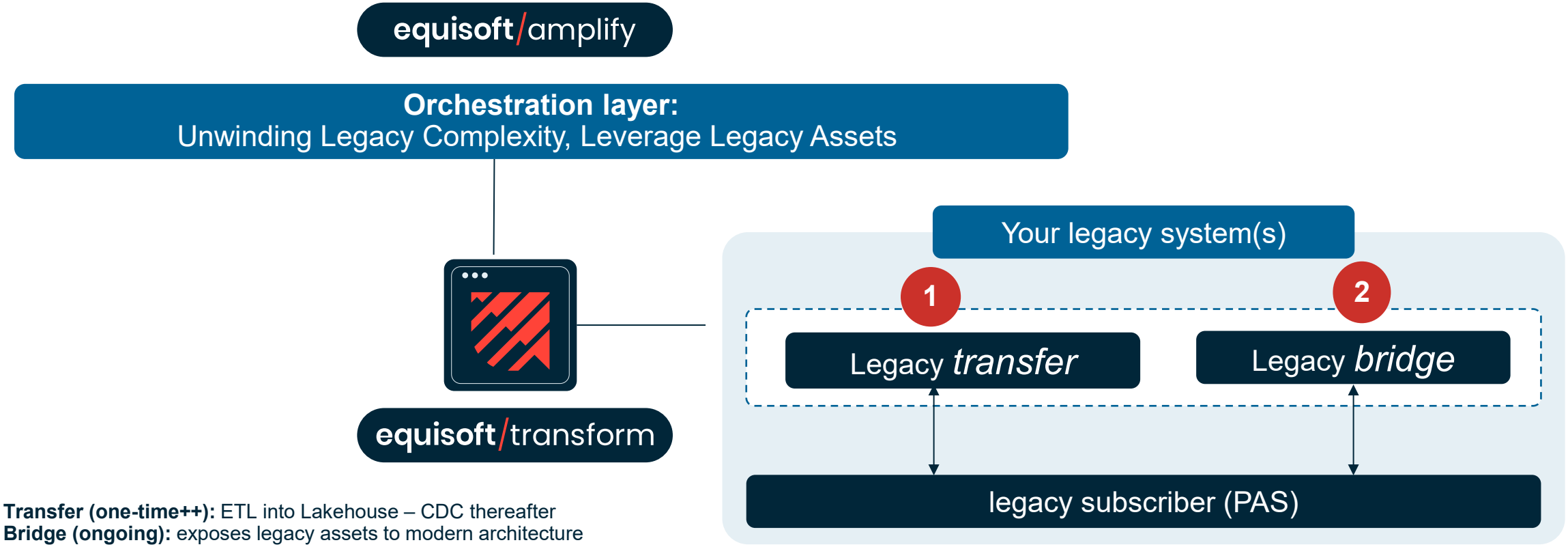
- The carrier example isn't about AI — it's about what becomes possible once your data moves freely
- Whichever path you choose, migration or integration, the journey/destination is the same: cleaner, more valuable data
- Equisoft/amplify's agentic layer builds on that foundation to automate the next layer of work
- The question isn't SHOULD you unlock your data — it's HOW

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Legacy bridge & transfer

Exposes and leverages data and legacy transactional capabilities already in place.
Concept Architecture Overview.



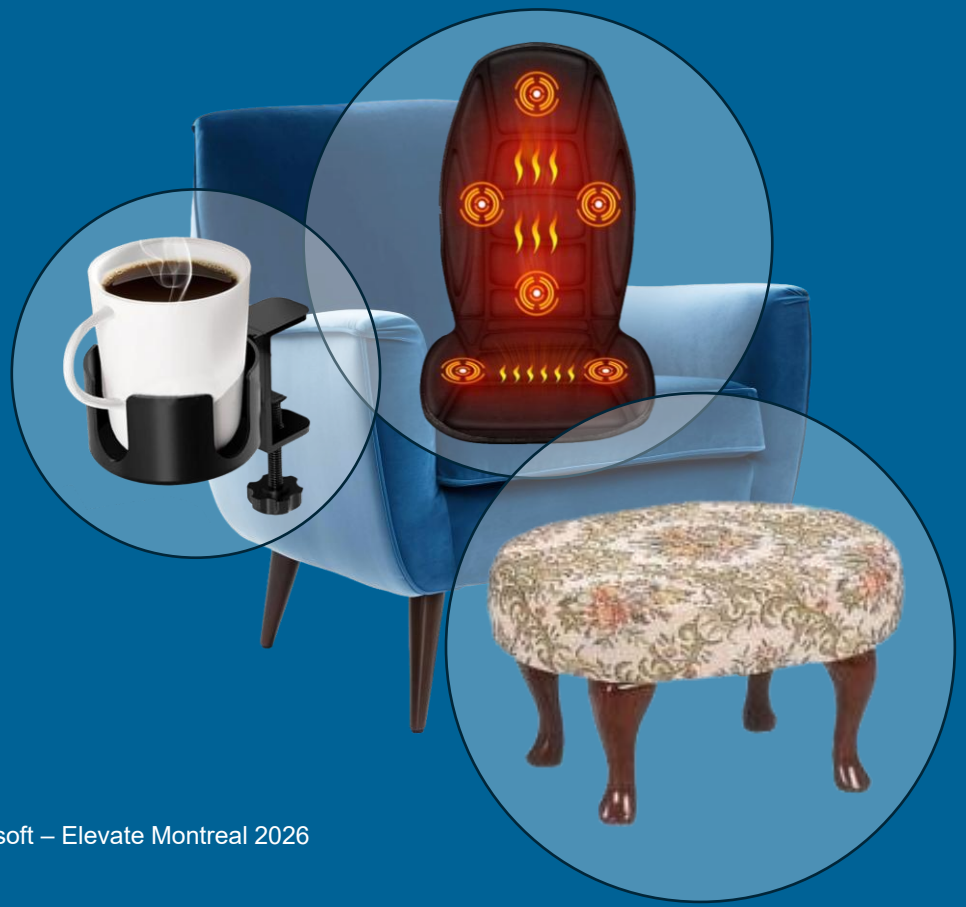
1. **Transfer (one-time++):** ETL into Lakehouse – CDC thereafter
2. **Bridge (ongoing):** exposes legacy assets to modern architecture

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Comparison of data approaches

Legacy



Modern



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Imagine a data future where...

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Insurers can leverage their data for predictive and real-time insights

The concept

- A "Digital Twin" for Insurance
- Information from less traditional sources

The Google Maps Analogy

- A digital twin of traffic and routes
- Valuable insights derived from that twin
- Google's solution > MapQuest

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Insurers can leverage their data for predictive and real-time insights

Applied to Insurance

- Insurers operate on paper maps.

  They have structured and unstructured data, policies, procedures, isolated knowledge across the enterprise.

- New data is needed to create a living "digital twin" from which you can create real-time predictive insights, not just historical record-keeping

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Three things to remember

Legacy systems don’t have to stay closed off. **Legacy Bridge and Transfer** both unlock transformative value.

Equisoft/amplify turns policy admin **from memory into brain**:

- analytics
- case management
- agentic process automation

Think of your own example, it works:

- real dollars
- real speed
- delivered with minimal disruption

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If you need help turning your data into information or using it in a modern context,

contact
your Account Manager or UCT

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AI Empowered Services: Embedding AI in End-to-End Project Implementation



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Dave Shively

Chief Operating Officer



Amit Sharma

AVP, Global PMO

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Where AI Plugs In — AI for every gate

Discover

- Info Summary
- Requirements Draft
- Documentation Generation

Plan

- Estimation
- Capacity Planning
- Project Reporting

Build

- Standards/ Best Practices
- Code Review
- XML Config Generation

Test/Deploy

- Test Case Generation
- Acceptance Criteria cross-check
- Test Automation

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What clients gain from our AI-embedded delivery



Faster time to value

- Deliver in 8 months
- Spend less time in discovery.
- Your team can focus on the business while we deliver



Lower total project cost

- Fewer change requests and post-production fixes
- Less rework required by your teams means the budget you planned is the budget you spend, no surprises



Data you can trust

- Go live with clean, accurate data. No post-launch cleanup required
- Immediate visibility & user enablement so your teams can make decisions right away



Higher adoption

- Fewer bugs means the system works the way it should from the start
- Less time spent in UAT, faster sign-off, less friction

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Embedded AI Usage Across Phases

BA Business Analyst | PM Project Manager | PO Product Owner | QA Quality Assurance | D/C Developer / Configurator

Discover

- Multi-Territory Product Analysis & Comparison
- Multi-Source Business Requirements Analysis
- Structured & Focused Workshops
- Summarize, Playback and Readout Assist
- Foundation-Aware Analysis and Gap Identification
- Requirement consistency and cross-req. patterns surfacing

BA PM PO D/C

Plan

- AI Augmented Story Creation
- Story\Change Impact Analysis and Diagnosis
- Capacity Analyzer and Estimation Assist
- Sprint Planning, Readiness and Dependency Mapping
- Requirement Traceability Matrix
- Project KPIs Reporting and Dashboards

BA PM PO QA D/C

Build

- Configuration Reviewer against Standards (Probe)
- OIPA configuration scaffolding – draft config.
- Manage Explained : Foundation Deep-dive
- Document\Letters – Translate and Integrate
- Query Assist and Performance Optimizer
- Design Connect : Analyze and Debug Configuration

BA PO D/C

Test & Deploy

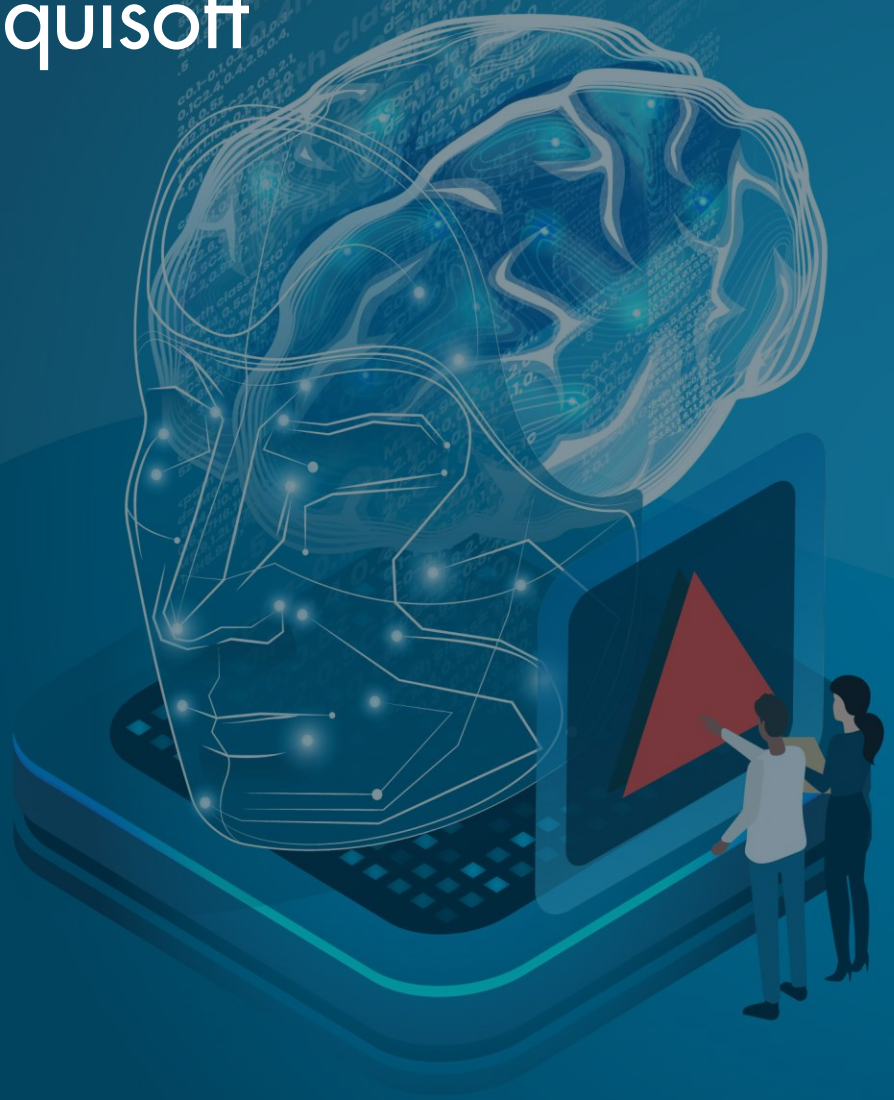
- Test Case Generator
- Test Data Generator
- Automation \ Regression Test Script Generator
- Defect Triage, Defect Documentation, RCA & RTM
- Final Reconciliation & Knowledge Transfer for Go Live

BA QA D/C

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Business Analysis Practice

Standardizing Approach to BA Processes and where AI is embedded

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BA Practice
Project Lifecycle Phases

Gap analysis

Gap Analysis ▸ Foundation Validation ▸ Readout Document

- Prepare for Sessions
- Hold Sessions
- Summarize Results
- Estimate & Produce Readout Document
- Statement of Work

Implementation

Detailed Requirements ▸ Refined User Stories

- Scope Intake
- Requirements Analysis
- Story Generation
- Refinement & Readiness
- Team & UAT Support

Deployment

Handoff ▸ Production

- Knowledge Transfer
- Final Scope Reconciliation
- Go-Live Readiness
- Warranty Support

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BA Practice – AI Strategy

★ AI focus
☆ AI targeted

Gap analysis

Prepare for Sessions ★
Review SOW, assemble BA team, build agenda – Mid 2025
BA Role: **Primary** — done

Hold Sessions
Facilitate workshops, demo EQ, capture gaps – Late 2025
BA Role: **Primary** — done

Summarize Results ★
Document gaps; AI-accelerated readout decks – Early 2026
BA Role: **Primary** — done

Estimate & Produce Readout Document
Size gaps by feature, compile readout deliverable – Mid 2026
BA Role: **Supportive** — done

Statement of Work
Refine scope with PM, confirm final SOW – Mid 2026
BA Role: **Supportive** — done

Implementation

Scope Intake
Map gaps to epics and features, establish backlog – Aug 2026
BA Role: **Primary** — in flight

Requirements Analysis ☆
SME sessions, foundation vs custom, change requests – Aug 2026
BA Role: **Primary** — in flight

Story Generation ★
AI-authored user stories, test conditions – Aug 2026
BA Role: **Primary** — in flight

Refinement & Readiness
PO and team refinement, sizing, sprint readiness, metrics – Aug 2026
BA Role: **Supportive** — planned

Team & UAT Support
Triage defects, verify fixes vs criteria. Capture release notes. – Late 2026 / early 2027
BA Role: **Supportive** — planned

Deployment

Knowledge Transfer ☆
Walk through solution, edge cases, limits – Early 2027
BA Role: **Primary** — planned

Final Scope Reconciliation ☆
Reconcile delivered stories to SOW – Early 2027
BA Role: **Primary** — planned

Go-Live Readiness
Confirm in-scope items resolved, release notes – Mid 2027
BA Role: **Supportive** — planned

Warranty Support
Post go-live triage: defect vs guidance – Mid 2027
BA Role: **Supportive** — planned

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User Story Generation Process

From a manually authored Product Requirements Document (PRD) to Jira-ready user stories, powered by a shared Claude Project



Build the Feature Level PRD

BA manually authors the PRD. Each requirement is tagged:

- Foundation
- Modification
- Enhancement



Load into Claude Project

PRD is added to an existing Claude Project containing:

- User Story Template
- Prompt



Execute the Prompt

Claude:

- Applies the Template to the PRD
- Drafts User Stories as a Word document

Iterate





Review & Refine

BA:

- Verifies the draft stories
- Updates them as needed before finalizing



Generate in Jira

Once finalized:

Prompt is re-run to create the User Stories directly in Jira

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Quality Assurance

Equisoft Functional QA Services Framework



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One Platform, Four AI-Powered Modules Built on Claude AI

Module 1

Test Case Design & RTM Generation

Automated:

- Test case design
- Traceability matrix

Module 2

Test Data Creation & End to End Automation

Automation Command Center which enables a user to:

- Create test data
- Push applications
- Process all activities
- Process End to End Flows

Module 3

Product Setup Validation

Rate and map validation against OIPA product specifications

Module 4

QA Defect Analyzer

Analyze Issues found against already reported bugs in the project and create a bug directly in JIRA if not a duplicate

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50%

Faster Test Case Creation





100K+

Rate Values Validated in Seconds

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AI-Powered Test Case Generation + Automation Command Center



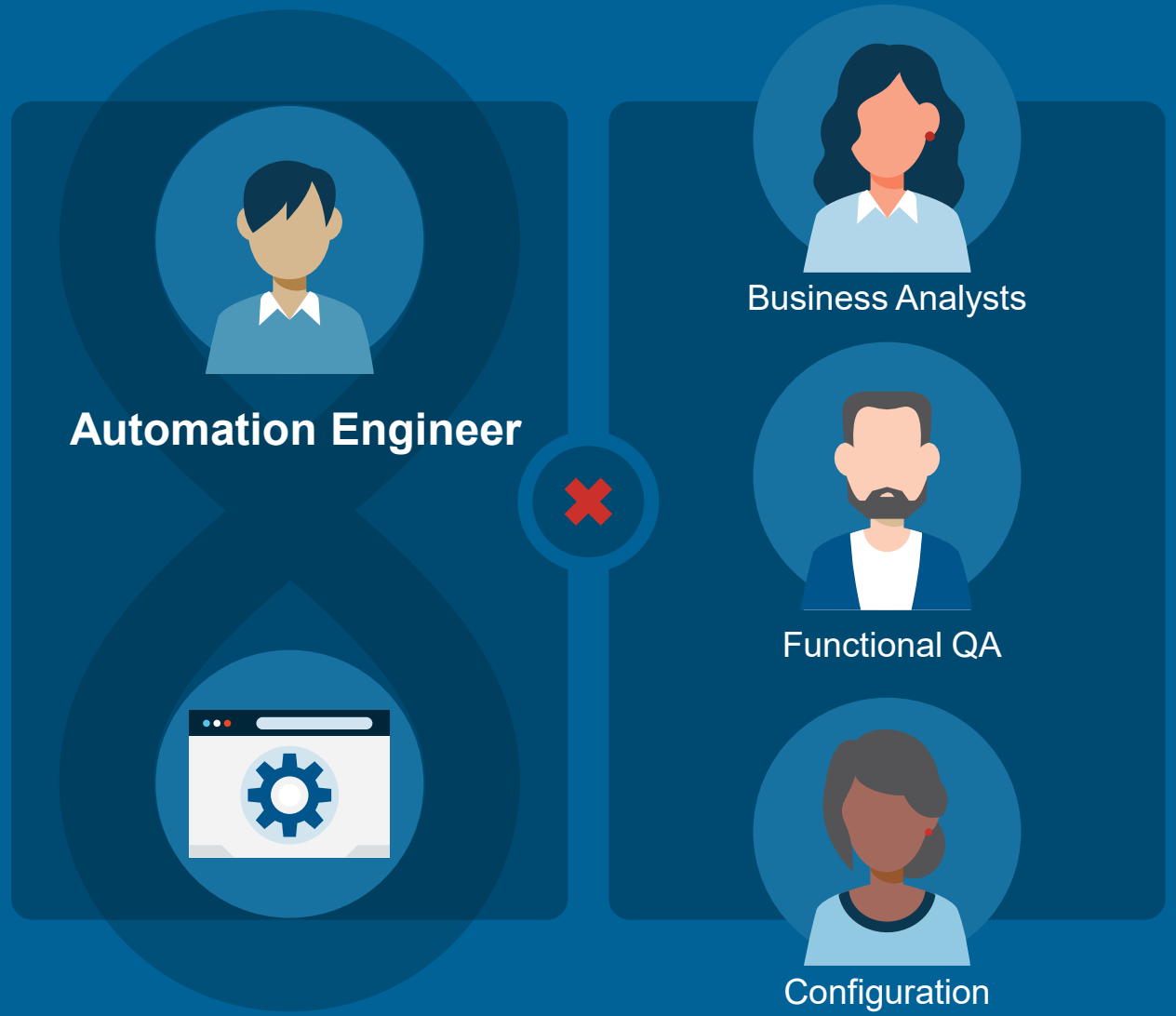
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Automation belongs to the entire project team, not just the pipeline

The traditional model

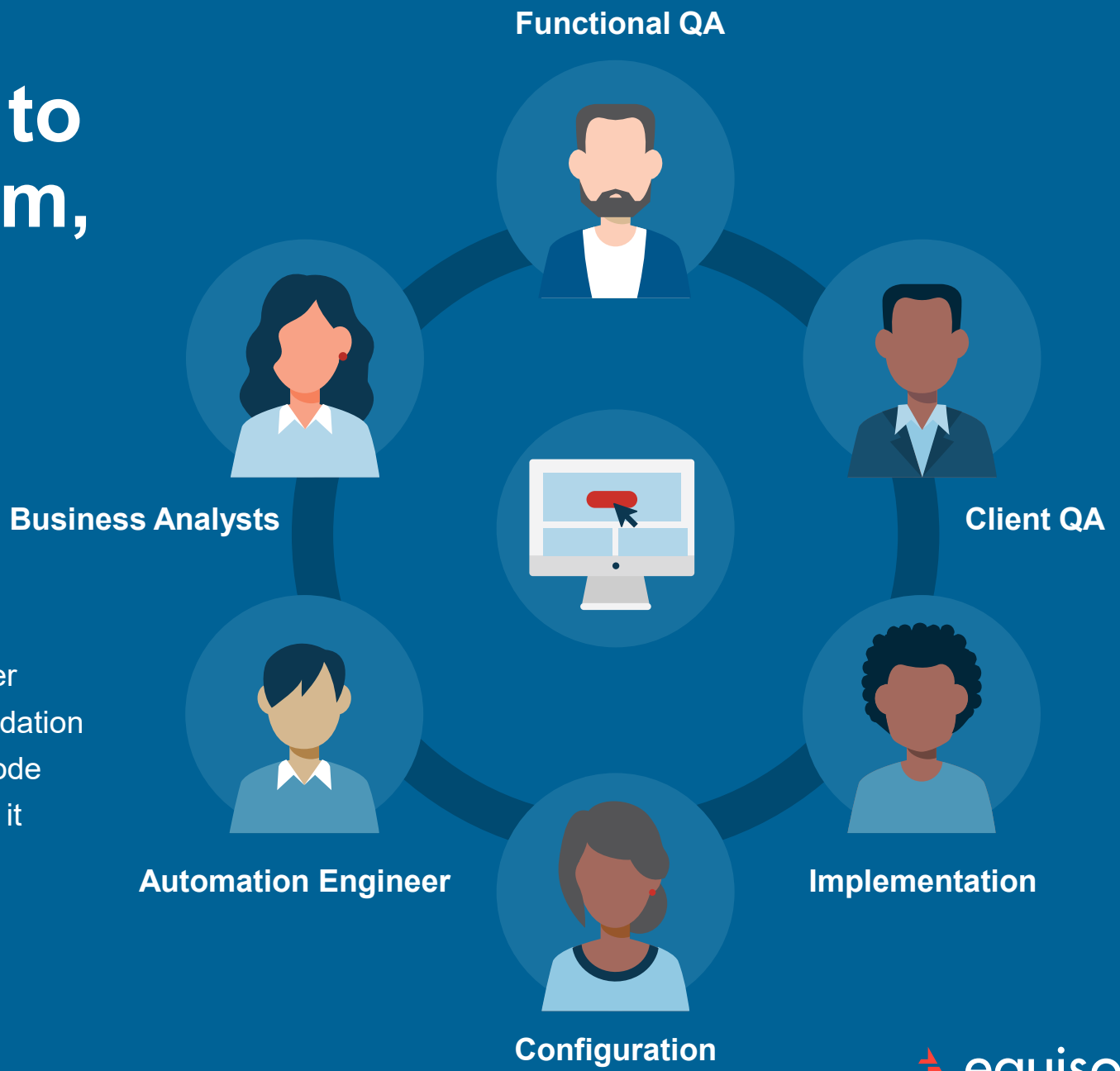
- Scripts live with the Automation Engineers
- Execution happens inside a CI pipeline
- BAs, Configurators and Functional Testers do not get to leverage automation for faster setup and validation



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Automation belongs to the entire project team, not just the pipeline



The command center model

- Anyone on the project runs any activity from a browser
- Functional testers uses to quickly setup cases for validation
- BAs compose end-to-end scenarios without writing code
- Configurators verify a change the moment they make it

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Equisoft/manage Decode

Deep-dive into our Foundation Configuration, Data Dictionary, Process Flows, Activity Descriptions and much more.

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Reducing implementation costs through shared foundations

Client empowerment strategy

Foundation Model	Staging Layer	Event Architecture	Equisoft/manage Decode (New)
Equisoft/manage Anchored	**Flattened Schema**	**Real-Time Access**	**Business Friendly**
Consistent data model & transaction framework baseline	Queryable, client-ready database for reporting & integration	Streaming policy & transaction events as they occur	Governed window into our foundation data model

Start from a strong baseline

Data-sharing strategies

Introducing Insights

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A business window into Equisoft/manage



Browse Without Code

Non-technical stakeholders explore fields, definitions, and relationships without SQL or developer support.

Increased Client Autonomy



Tied to Equisoft/manage Model

Every entry traces directly to the Equisoft/manage data model, ensuring consistency between staging, events, and production data.

Data Consistency



Self-Service Documentation

Clients locate the data they need and understand its context, dramatically reducing onboarding and integration effort.

Faster Onboarding



Accelerates Time-to-Value

Teams can independently design integrations and reports without opening a support ticket.

Lower Implementation Costs

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Available Tools



Data Dictionary

Drill-down browse and search across all entities for fields + AI Documentation



ER Diagram

Visual map of how entities relate in the database



Spawning Diagram

Traces how transactions trigger one another



Allowed Transactions

Permitted transactions by policy status — user-added vs. spawned-in

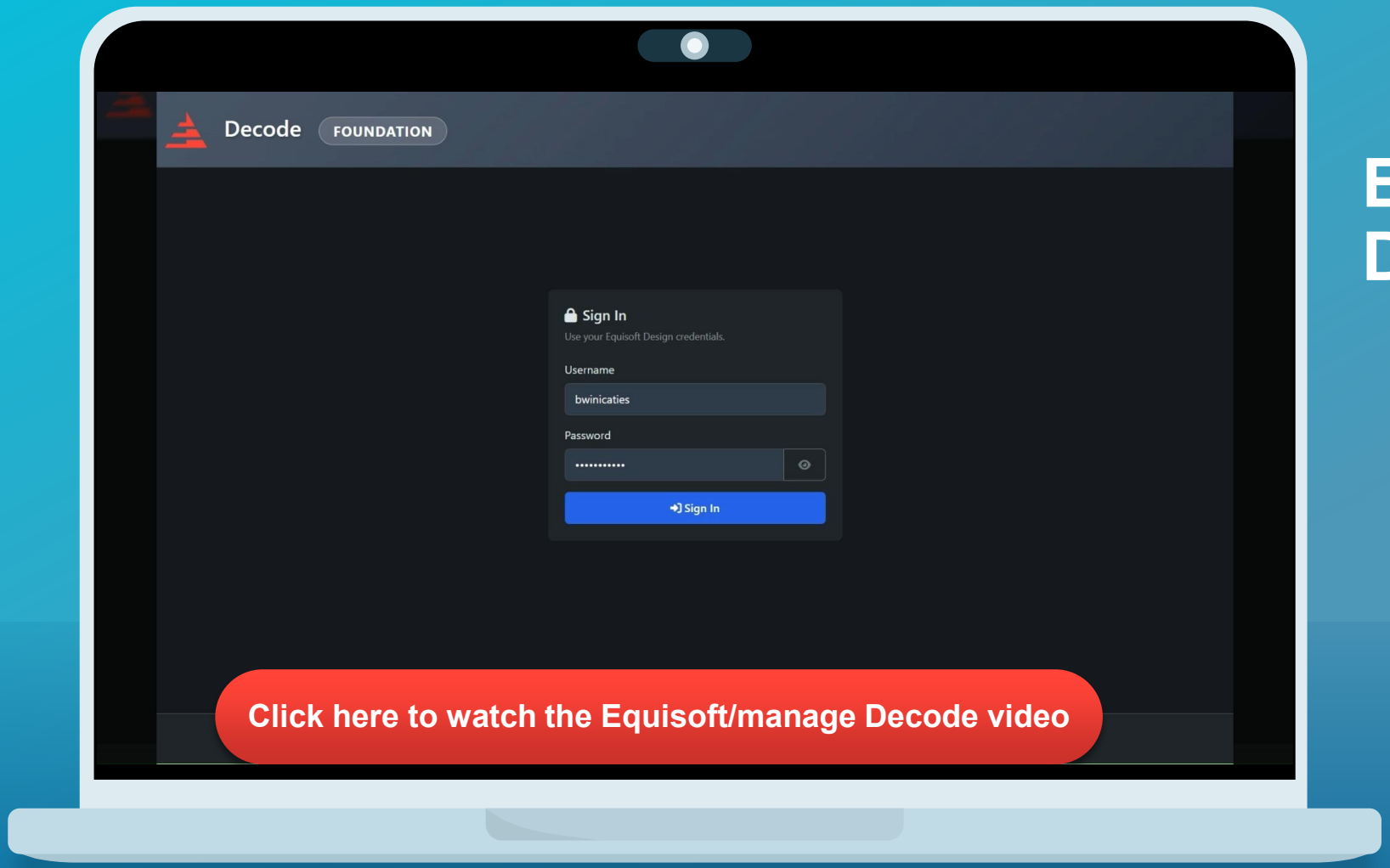


OIPA Security Groups

Plain-language breakdown of OIPA group permissions

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Equisoft/manage Decode

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