

CASE STUDY **BROKERS**

The brokerage that answers, quotes and files claims on its own

THE CLIENT · THE PROBLEM

A family brokerage, second generation

8

people in the office

3,000

policies in the book

12

insurers and extranets

1

phone that never stops

01

The phone rules

Half the calls are “how's my claim going?” and “can you quote me?”. The team lives interrupted while new leads wait.

02

Every claim is an obstacle course

Filing a claim means 20-40 minutes of extranet, each insurer with its own forms. Meanwhile, the client is in the dark.

03

The book leaks in silence

Renewals nobody flags, returned receipts that end in cancellation, and clients who insure the car with you... and the house with someone else.

THE SOLUTION

Their digital workforce, seat by seat

A single brain — the brokerage's knowledge — feeds all its agents. Each module is a job position, not a tool.

THE BASE — WHAT WE ALWAYS SET UP

AI Employee **SALES**

Answers WhatsApp and calls 24/7 with the house voice: solves policy questions, qualifies leads and books with the team.

EKONE **TECHNOLOGY**

The nervous system: CRM with the whole book, funnels, landing pages and calendar, all connected.

Email Agent Pro **CUSTOMER CARE**

Runs the info@ inbox: recognizes whether the sender is a client and what policies they hold, and leaves the reply ready to approve.

Instagram Agent **MARKETING**

Answers DMs and turns the curious into appointments.

LinkedIn Agent **MARKETING**

Finds local SMEs and freelancers and opens conversations for group policies and fleets.

Reels & Ads Creator **MARKETING**

The broker's local advertising, produced and published without an agency.

Lead Magnet **MARKETING**

"Paying too much for your insurance?": the magnet that captures lead data in exchange for a free review.

THE SOLUTION · 2

FROM THE AI COMPANY CATALOG

Collections AI **FINANCE**

Chases returned receipts with a friendly, escalating tone before the policy hits cancellation.

THE SECTOR-EXCLUSIVE POSITIONS

Quoting Agent **SALES**

Asks for the data (or a photo of the current policy), builds the file for the multi-quoting tool and returns the proposal before the lead goes cold.

Renewals Agent **SALES**

Watches expiry dates, warns in time, and if the premium goes up proposes alternatives before the competition does.

Document verification **OPERATIONS**

Collects ID, previous policy and vehicle papers, validates them on the spot and completes the file.

Managed Meta Ads **MARKETING**

Constant local traffic into the AI Employee.

Multi-policy Agent **MARKETING**

Knows each client's lines and offers the missing one at the right moment: car → home → life → health.

NEW · AVAILABLE

★ Claims Agent

It takes the claim at any hour, collects photos and details, and files it by itself: it moves through the insurer's extranet like one more employee — filling forms, attaching documents — and even calls the insurer by phone when needed. Then it doesn't let go:

- ✓ Files the claim in each insurer's extranet, just like the office would
- ✓ Calls the insurer when the process requires it
- ✓ Daily follow-up: client and broker always have the latest status
- ✓ From filing to closure, without anyone in the office touching an extranet

AN ORDINARY DAY

Life with a digital workforce

07:58

A lead asks for a car quote on WhatsApp. By 8:02 they've given their details and have an appointment for the proposal.

03:00

A client had a bump in the night. When the office opens, the claim is already filed in the extranet and the client has a case number.

11:30

The voice agent answers two “how's mine going?” calls with the file up to date.

17:00

The week's renewal notices go out, plus a friendly nudge on a returned receipt.

20:00

The owner gets the summary: what came in, what was processed, and what needs a signature tomorrow.

EK

INDICATIVE RESULTS

What similar businesses see

~7/10

queries solved without touching the team

24/7

claims filed, at night and on holidays too

<1 min

response to new leads, at any hour

100%

renewals flagged on time

24h

returned receipts chased before cancellation

Estimates based on deployments in similar businesses. Every brokerage is different: none of this is a promise or a guarantee — it's what we design to happen.

STARTS AT

9.490€

+ 279€/mo

A deployment like this starts at the Growth Pack (€9,490 + €279/mo) — the full base with the 5 standard modules. Sector positions are quoted by insurers and volume on the discovery call.

THE OWNER'S VOICE

“I thought this was for big brokerages. Now the 3 AM claim files itself and my team finally does what it knows best: advising.”

— Jorge, insurance broker



Shall we talk about your brokerage?

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Sam Laniakea

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