3Cloud

Broker Portal of the Future

Mobile Platform Empowering Sales to Expand *Cross-Selling* Based on Client Needs
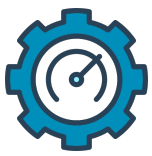
Problem

- 175 agencies using **disparate systems** with unique metrics, complicating performance measurement

- **Difficult leveraging acquired data** for cross-selling & upselling insurance products

- **Lack of unified client data** hindered comprehensive understanding & personalized service delivery

Solution + Result

01 Build & implement an AI-powered customer-centric app to enhance decision workflows & client interactions

02 Implemented AI & analytics for personalized service, improving client satisfaction & increasing cross-sell opportunities
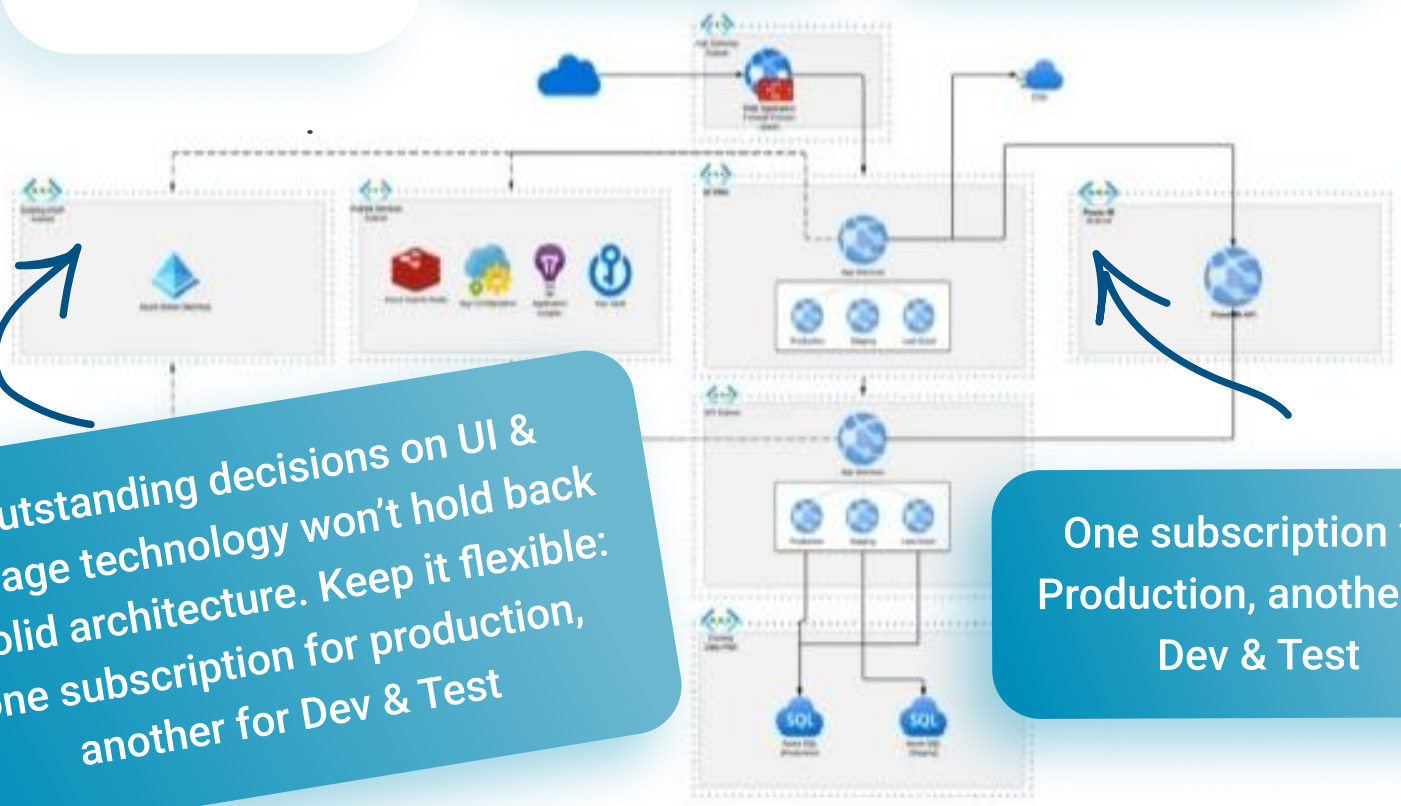
Technical Use Case

AI

Data & AI Focus

Azure OpenAI   Cognitive Services

Outstanding decisions on UI & storage technology won't hold back a solid architecture. Keep it flexible: one subscription for production, another for Dev & Test

One subscription for Production, another for Dev & Test

AI Complexity Level

1 Beginner   2   3   4 Expert

UI Prototype

Use AI to predict future trends and support decision making

Product Insights

Client Retention Rate
86.6%

Policies
86.6k

Policy Retention Rate
86.6%

Sale & Exposure
$86.6m

Renewal Retention Rate excl. R&I
86.6%

Estimated Premium
$489.2m

Premium Retention Rate incl. R&I
86.6%

Last 90 Days   Prior Month

Ready to redefine and recalibrate your enterprise growth trajectory by embracing AI technology?

🌐 3cloudsolutions.com   ✉ sales@3cloudsolutions.com

📞 888-88-AZURE