

# Case Study



## An Insurance Broker Streamlines Commission & Policy Tracking

### Client Overview

A corporate insurance broker with operations in 7 cities, selling 50+ products of insurers to companies.

### Challenges

- Commission details didn't match actual policies sold
- Multiple offices caused data confusion
- Manual tracking was slow and error-prone
- Difficulty generating consolidated reports

### Solution

- OCR system extracts key info from policy PDFs
- Automatic matching with insurer commission data
- Centralized reporting
- Real-time dashboards for quick insights

### Benefits

- Accurate commission tracking
- Reduced reconciliation effort
- Centralized policy and commission view
- Faster, more efficient operations



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