How an Actuarial Firm Projects $2M Profit Increase with AI-Workflows

Company Overview

A top U.S.-based actuarial consulting firm serving public and private sector clients across retirement, health, and welfare benefits needed to modernize. With 100+ experts and over 400 clients, their continued growth outpaced legacy tools—prompting a shift toward scalable digital infrastructure that empowers teams to work smarter, not harder.

The Challenge

The firm's manual actuarial workflows slowed service delivery and strained resources. Reports took up to 60 days to complete, relying on spreadsheets, manual data entry, and extensive client coordination. These bottlenecks limited scale and exposed the firm to operational risk. Leadership sought a solution that would increase efficiency, reduce errors, and unlock capacity for client-facing work.

The Approach

Starting with a Blueprint Workshop, we mapped out pain points and defined success metrics. The team aligned on a secure, cloud-based system that automates time-intensive processes and integrates with existing actuarial tools. The goal: streamline internal operations and reallocate time to higher-value client services.

Pain Points

- ✗ Outdated, Manual Workflows
- ✗ High Risk of Human Error
- ✗ Report Delivery Delay
- ✗ Inefficient Use of Actuarial Resources
- ✗ Time Consuming Manual Tasks

Product Requirements

- ✓ Integration with Actuarial Tools
- ✓ Data Reconciliation and Validation
- ✓ Streamlined Workflows
- ✓ Scalable Architecture
- ✓ Support Growth
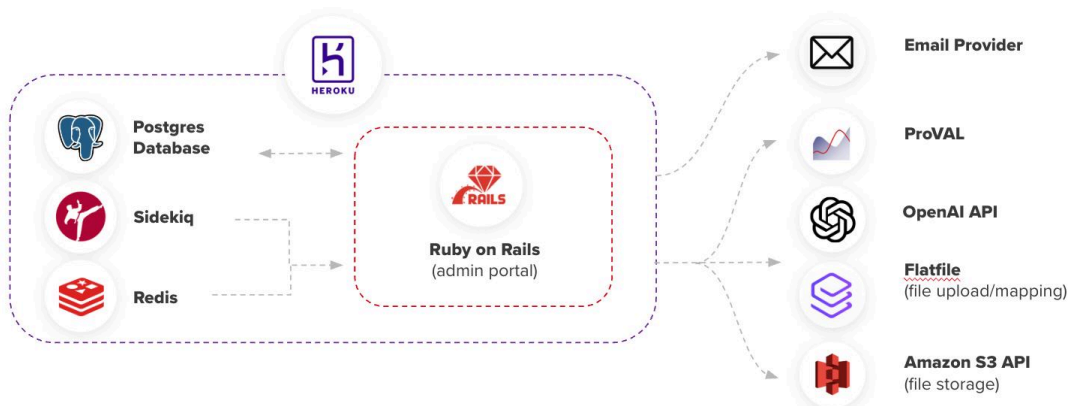
Saving Time, Reducing Risk, and Scaling Smarter with AI-Enhanced Systems

The Solution

The AI-enhanced platform is tailored to actuarial operations. The system automates data workflows, reconciles historic and current records, and replaces spreadsheets/email exchanges with a centralized, user-friendly interface.

Streamlined Data Workflows – Automates intake, validation, and reconciliation.

AI-Driven Parsing – Accelerates generation of valuation-ready data.

User-Centric Interface – Improves usability for actuaries and clients alike.

The Results

By eliminating manual inefficiencies, the firm accelerated delivery and increased profitability. Actuaries now focus on strategic work, driving better outcomes and sustainable growth.

✓ **Reduced Human Error**

✓ **Accelerated Response Time**

✓ **Streamlined Data and Reporting**

✓ **Improved Client Interaction**

✓ **Enhanced Scurity & Compliance**

$2M
Projected Annual Profit Increase

10x
Faster Service Turnaround