

# 2025 ENROLLMENT TECHNOLOGY STRATEGY SEMINAR

**The Power of AI:  
Transforming Workplace Benefits**

# Agenda

- Introductions
- The current AI industry landscape
- Panel discussion
- Takeaways
- Questions & answers



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Wellfleet



Is your company using artificial intelligence (AI) for any workplace benefit business functions?

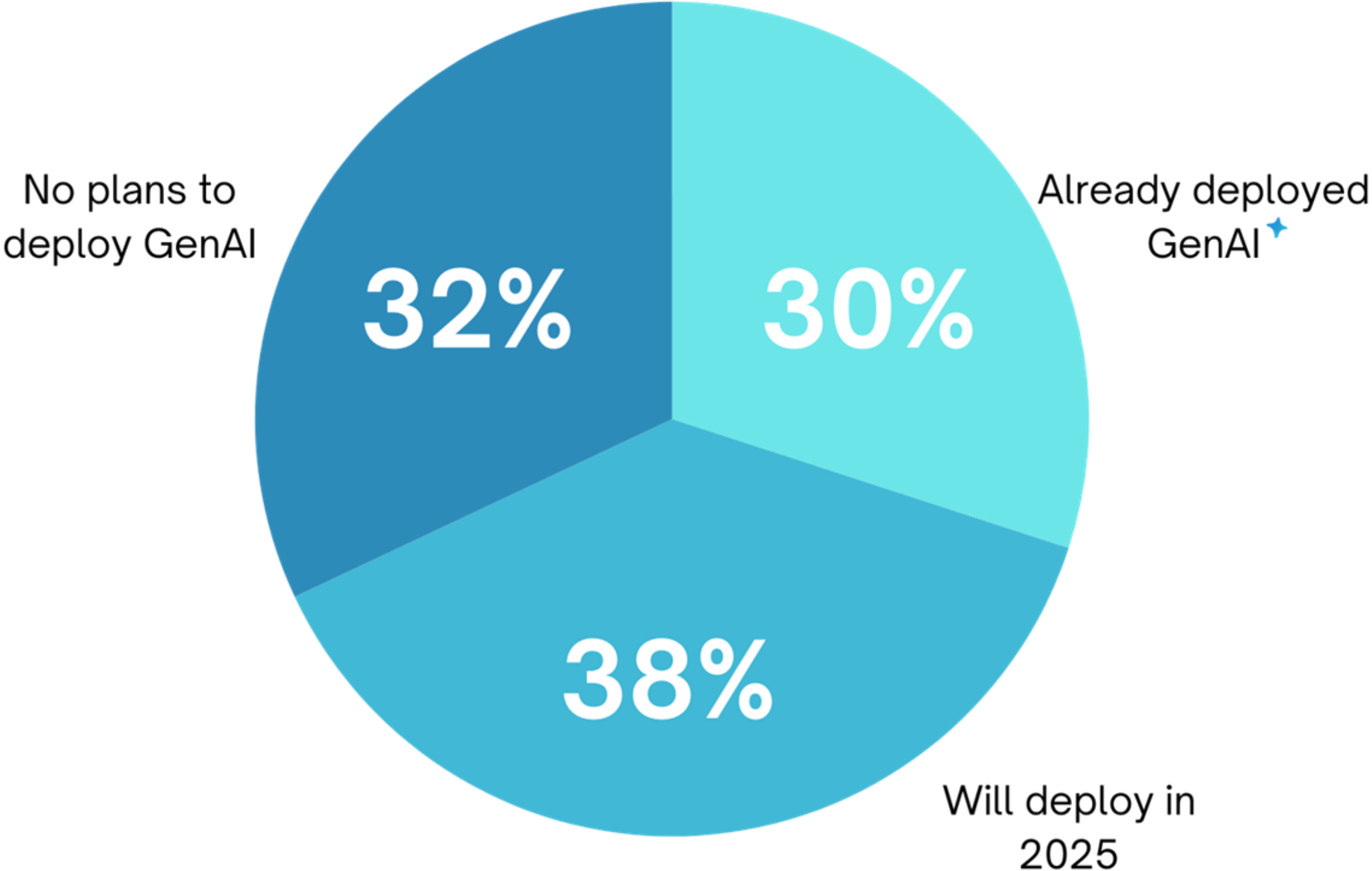
Yes



No



# AI Adoption in Insurance



Source: The 2025 Gartner CIO and Technology Executive Survey



## Which business functions does your company consider to be the most promising potential uses for artificial intelligence?

User-Facing Chat Bot



Claims



Data Insights



Underwriting



Create Client-Specific Materials



Decision Support



Quoting / RFPs



Billing



Build BenAdmin



Personalized Communications and Marketing



*Top unmet needs for digital experiences:*

**Same-day claim payments**

**Self-service / real-time quoting**

**Text messaging**

**API for employee data exchange**

**Implementation**

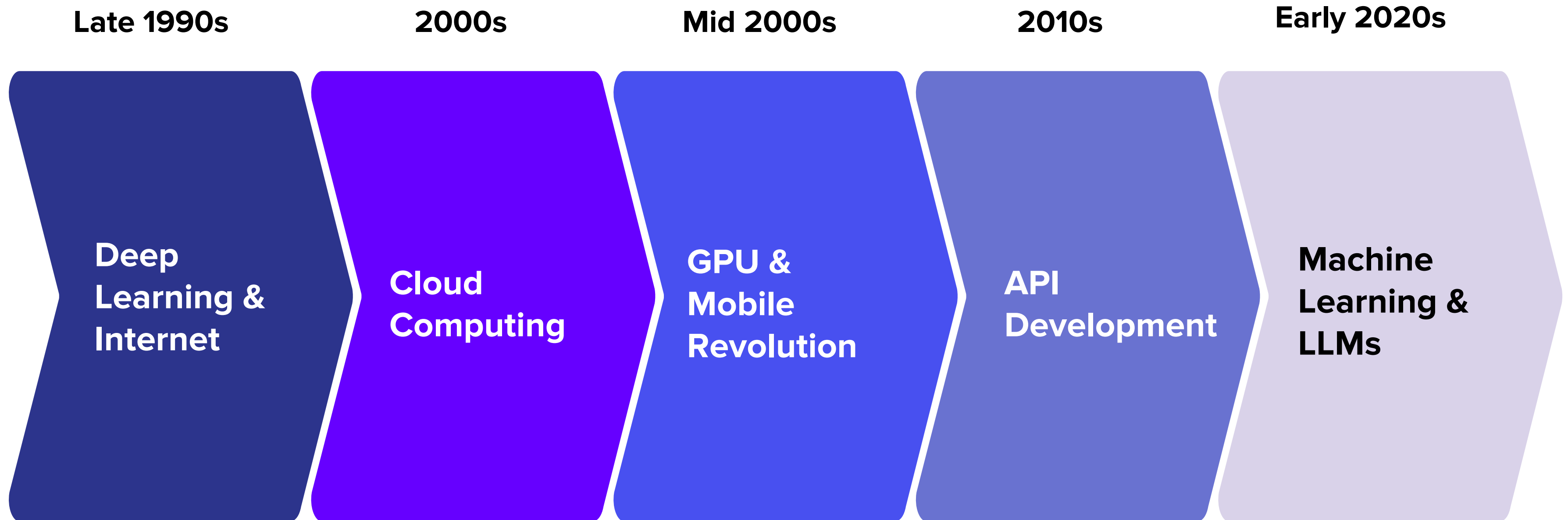
**Live chat / chatbot**

**EOI submission**

**Decision support**

**Employee communications**

# Tech Milestones Leading to AI Revolution





# Glossary of Terms for AI and LLMs



## Copilot

When the machine requires human validation and can not answer autonomously.



## Horizontal AI model

Customized for the needs of specific business functions or tasks.



## Vertical AI model

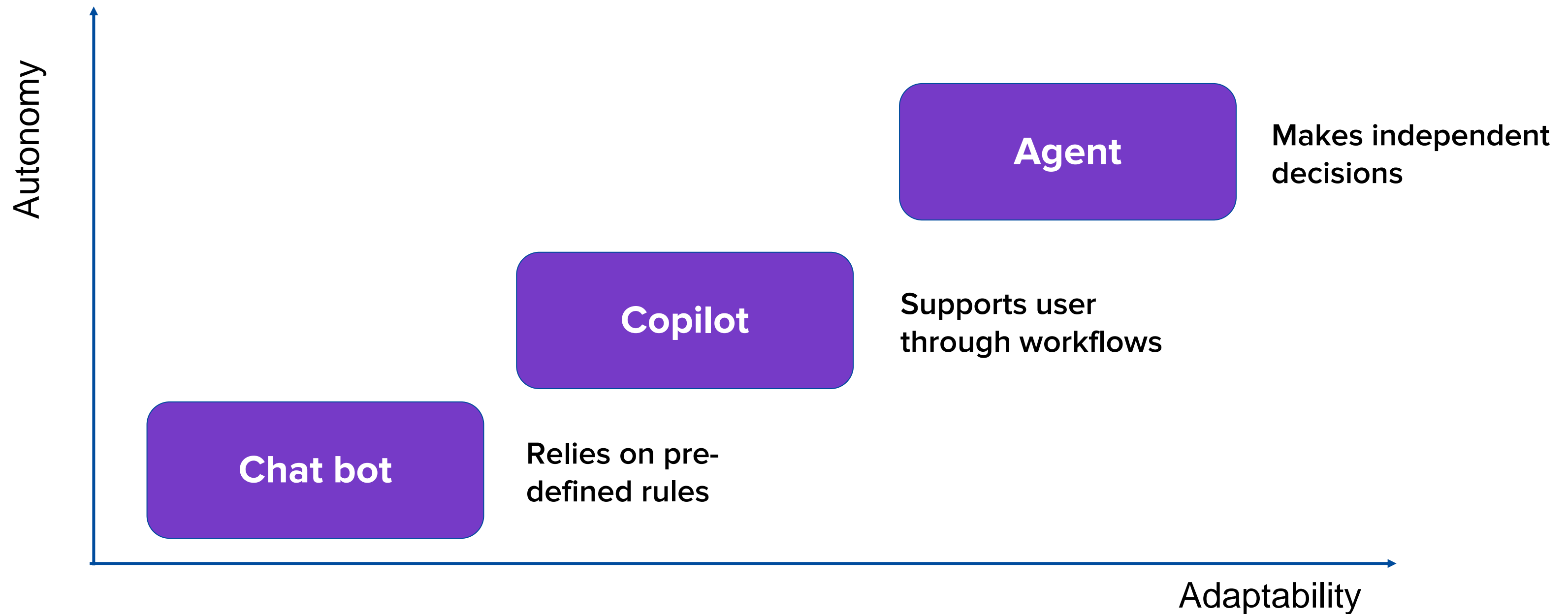
Customized for the needs of specific industries.



## Generative AI

AI techniques that learn from representations of data to generate new artifacts.

## AI Agents have the potential to redefine enterprise processes and consumer behavior



**What challenges do companies commonly face when integrating AI into their operations, and how can these challenges be overcome?**

**With the increasing use of AI, how can the industry ensure the privacy and security of sensitive customer data?**

**How are companies preparing their employees to work alongside AI systems in the group insurance sector?**



**How are traditional insurance companies collaborating with insurtech startups to leverage AI advancements?**

# Four dimensions to AI selection process



## Risk Assessment

- Bleeding edge or safe bet
- Regulatory and compliance impact



## Organizational Approach

- Business user support and involvement
- Ability to scale
- Human-in-the-loop impact
- Process change and change management
- Employee reaction
- AI data readiness



## Business Value Assessment

- ROI and time to value
- Strategic vs. every day value



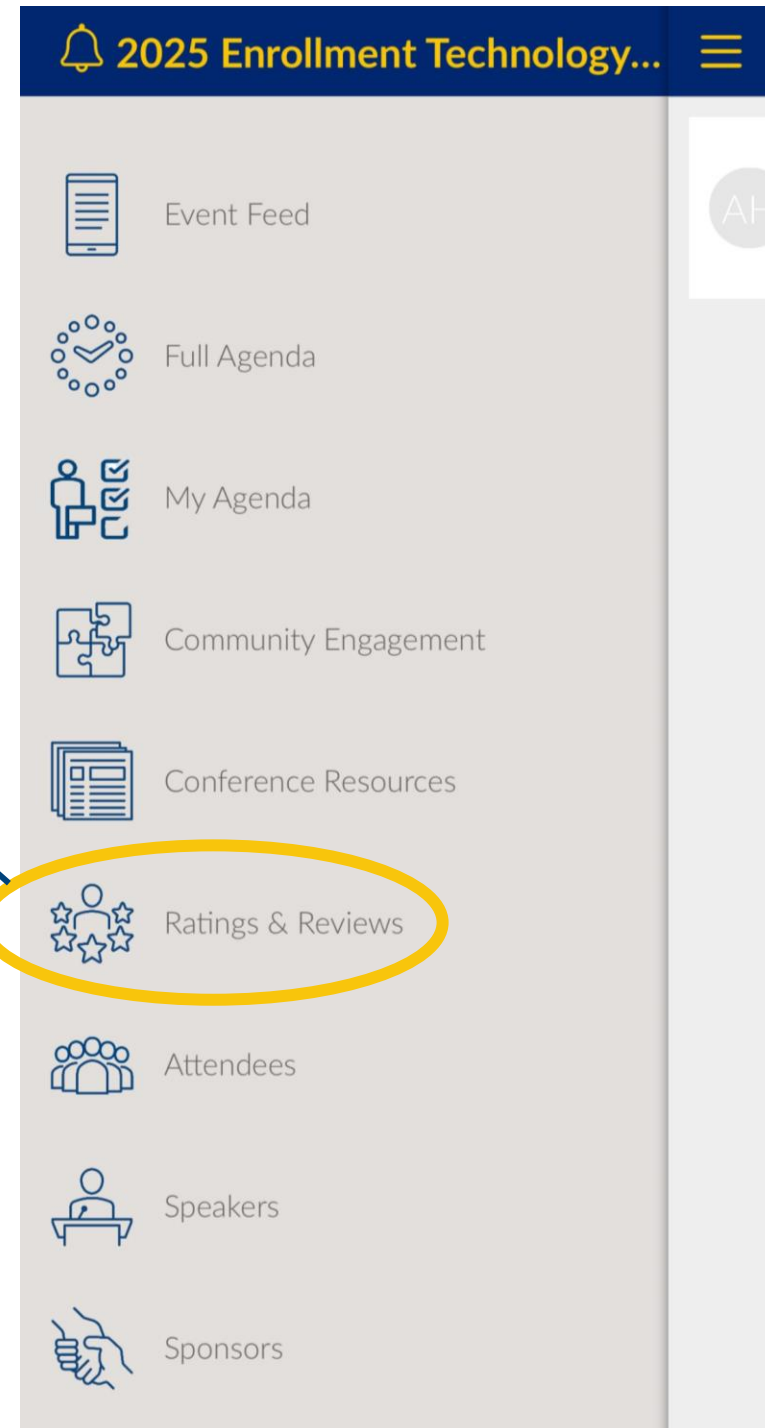
## Vendor / Solution Approach

- Buy, build, rent or co-develop
- Impact on skills and resources
- Embedded GenAI and impact

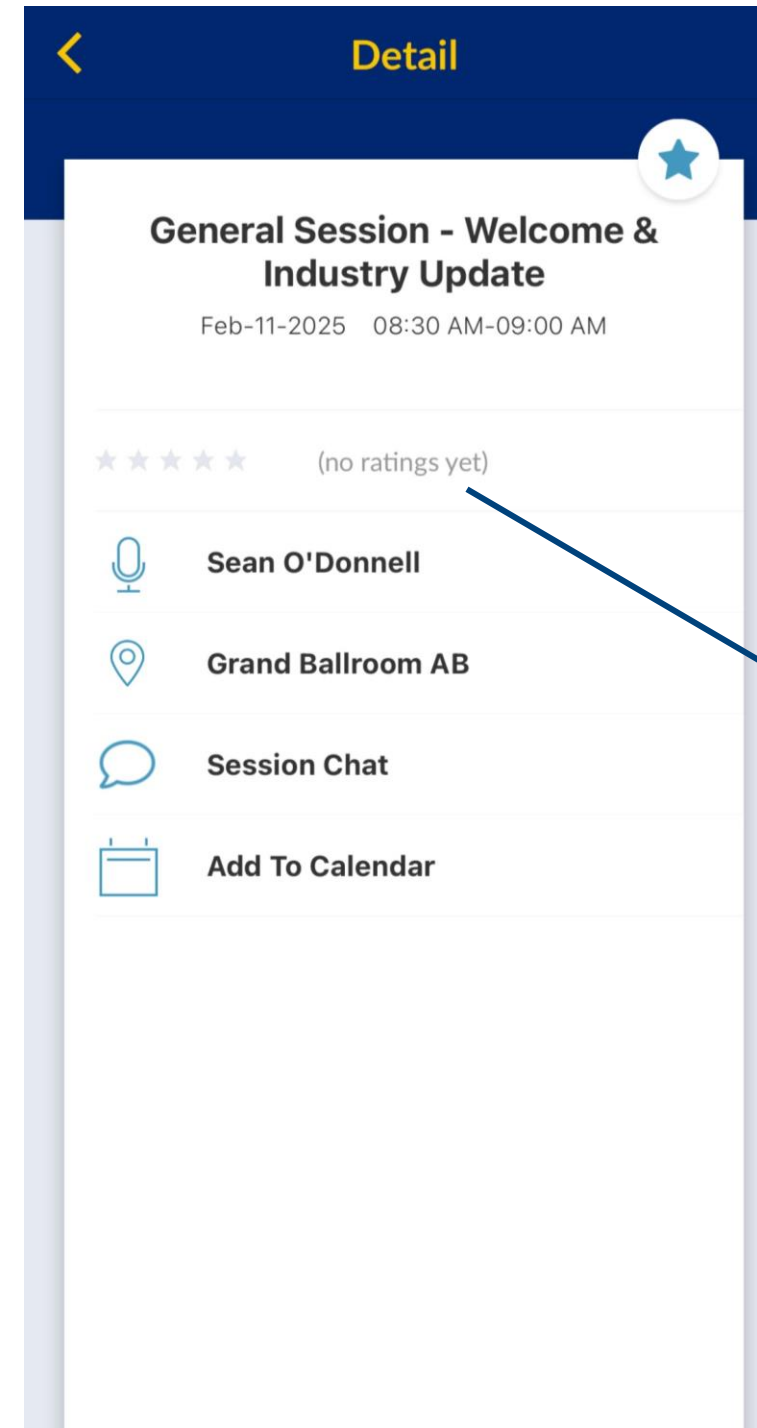
**What do you envision as the future role of  
AI in the group insurance industry?**

# We Want to Hear From You. Leave a Rating & Review

## Module Option



## Agenda Option



# Thank You

