



Unified Enterprise Platform – Insurers

Public copy



Singapore(HQ). Indonesia, Philippines, Nigeria. Vietnam, India



Sirriuz is WGC's proprietary AI-powered insurance platform designed to streamline CRM, policy administration, claims, re-insurance, and back-office operations through intelligent automation and AI agents. Built on Gartner and Forrester-recognized technology platforms, Sirriuz combines deep insurance domain expertise, collaboration with industry-leading experts, and extensive real-world client implementation experience to deliver scalable, secure, and future-ready digital transformation solutions.





Partners

In a rapidly evolving technology landscape, White Gate Consulting ensures Sirriuz integrates with leading Gartner and Forrester-recognized platforms—delivering industry-leading insurance solutions with enterprise-grade security, compliance, and scalability.

ANTHROPIC



Creatio

insureMO

coherent





Sirriuz

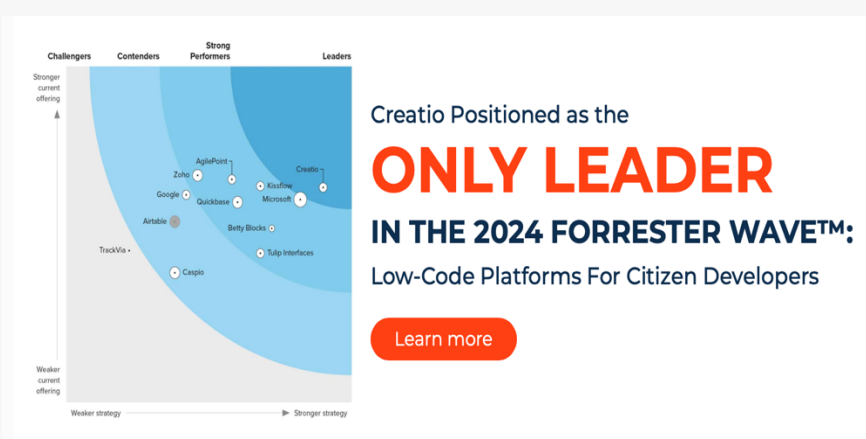
White Gate Consulting (WGC) and Creatio have formed a strategic marketplace partnership to position Sirriuz, WGC's proprietary insurance platform, on the Creatio Marketplace for global deployment.

Sirriuz combines Creatio's AI-native, and process automation platform with White Gate Consulting's deep domain expertise in insurance, operations — backed by over 100 years of collective insurance industry experience across underwriting, distribution, reinsurance, core systems, and digital transformation. Purpose-built for insurers, Sirriuz delivers end-to-end lifecycle capabilities, embedded AI agents, and industry accelerators designed to modernize operations, enhance growth, and improve governance.

Gartner



FORRESTER



Creatio Positioned as the

ONLY LEADER

IN THE 2024 FORRESTER WAVE™:

Low-Code Platforms For Citizen Developers

[Learn more](#)

DECEMBER 08, 2023

Creatio Partners with White Gate Consulting to Bring Digital Transformation to a New Level for More Finserv Organizations Worldwide

The new partnership is aimed at combining the deep finserv expertise of White Gate Consulting with the award-winning Creatio's no-code platform

WHITE GATE CONSULTING
FINANCE. ESG. CONSULTING & DELIVERY

Workday

White Gate Consulting & Workday: Transforming Insurance Finance Through Intelligent Integration

This strategic collaboration combines Workday's world-class finance platform, White Gate Consulting's deep insurance domain expertise, and seamless integration with Sirriuz to create a modern, connected, and compliant finance ecosystem. By bringing together policy administration, operational workflows, and financial management into a unified environment, clients can achieve true straight-through processing, faster operations, enterprise-wide financial visibility, and enhanced regulatory compliance through out-of-the-box integration capabilities.



Workday is a Magic Quadrant™ Leader

For the third year in a row, Workday was named a Leader!

Gartner®

Greater outcomes for more customers

Workday continues to deliver these outcomes to a growing community

Workday by the Numbers

\$9.5B

Annual Revenue
30%+ reinvested in R&D

11K+

Global Customers

32%+

of the
ASX 100

75M+

Users under contract

65%+

of the Fortune 500

7x

higher community
engagement compared
to other vendors

95%+

Customer
Satisfaction

95%+

On time deployment

Efficiency gains at existing Customers

13%

Reduction in cycle time to
perform monthly close

13%

Reduction in FTEs required
for accounting close

24%

Reduction in time to prepare
financial statements

544%

Increase in dimensions available
for financial & mgmt reporting

Recognitions

Gartner
2025

Gartner Magic Quadrant **Leader for Cloud HCM, Cloud ERP Finance**
and **Cloud ERP for Services-Centric Enterprises**

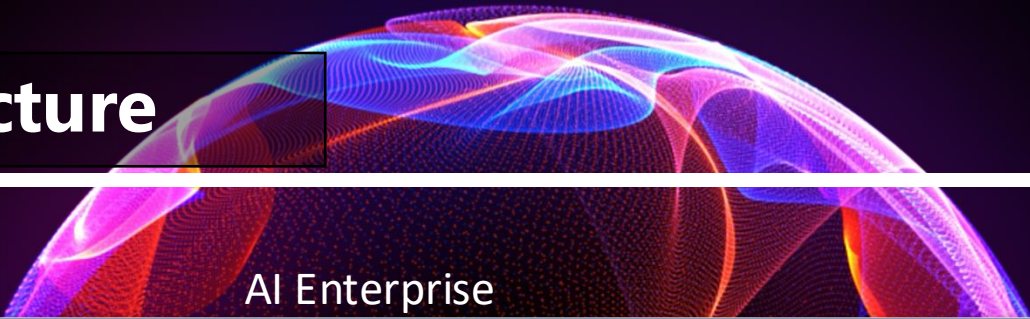




Sirriuz Architecture

Overall Sirriuz Architecture

Gartner leader Technology Stack



Sirriuz - Modules

Customer Portal

Business Portal

Management & User Dashboards

AI Agents

Embedded Insurance

MARKETING 

SALES 

SERVICE 

Quoting Management

New Policy Inception Process

Renewal Policy Process

Facultative/Treaty Re-Insurance Process

Claim Process

2FA

Setup User & Matrix

Workflow

Notification

Activity Management

SSO

Platform Security - SOC2 Compliant



Financial Management



Insurance CRM Capabilities



CRM - Scope in Detail

Align marketing, sales and service on a single CRM platform and manage the complete customer journey

MARKETING

- Full-fledged tools for accelerating **lead management processes** – from lead generation to hand-off to sales
- **360-degree profile** which stores complete customer and prospect information and interaction history to help users craft the most personalized messages
- Sophisticated **campaign management** tools to orchestrate customer journeys and accelerate the lead-to-revenue cycle
- Powerful tools for **email marketing** with high-end template designer and extraordinary audience segmentation capabilities to streamline email marketing initiatives
- Comprehensive **analytics** with customizable dashboards to evaluate the effectiveness of lead generation channels and optimize outreach efforts

SALES

- Cutting edge BPM tools for end-to-end **sales cycle management** which drive customer acquisition, development, and retention for sales processes of any type
- **Complete view of all customer data** and communication history throughout the complete customer journey
- **Pre-defined processes** to enable quick product adoption and help sales professionals bring best industry practices to work
- **Sales productivity** tools and full-fledged sales **analytics** to raise sales teams' productivity, streamline forecasting and track KPIs
- Low-code **AI tools** that leverage Machine Learning to help users create the most relevant next-best offer recommendations by utilizing historical data on customer behavior

SERVICE

- Powerful BPM tools to streamline **service processes** for Claims of any type and complexity – from simple service requests to complex problem processing
- Comprehensive **customer engagement functionality** with a 360-degree customer view to drive personalized omnichannel communications while having a complete history of all interactions
- **Out-of-the-box processes** to accelerate claims service operations to achieve customer care excellence using industry best-practices
- Agile **analytics** to track teams' performance and service delivery quality and effectiveness
- Robust **AI tools** that allow users to eliminate manual work, boost productivity and facilitate data-backed decision-making for more effective service processes



Customer 360

- Single, centralized view of all customer information across the lifecycle
- Consolidates data across:
 - Sales (leads, quotations, policies, invoices)
 - Services (Claims and service requests)
- Real-time updates as transactions occur across modules
- Complete relationship visibility including:
 - Account details, contacts, and communication history
 - Ongoing engagements and past interactions with Clients
- Integrated timeline tracking all activities, emails, and updates

Secure Guard Insurance

Lead conversion score: 0

Owner: Christina Dela

Account ID

Primary contact: James L Smith

Type: Customer

Category: Select category

Industry: Insurance

Phone - primary: 66875699

ACCOUNT INFO

Also known as: Secure Guard

RC Number: 7797530-99373

Nature of Business: Insurance

Annual revenue: 10 million or less

Date of incorporation: 10/22/2017

Business entity: Ltd.

No. of employees: 201-500

Addresses

	Primary	Address type	Full address	City
1	☒	Actual	Philippines, Nueva Ecija, Central Luzon	Central Luzon

James L Smith

Account: Secure Guard Insurance

Full job title: Business Analyst

Email - primary: james.smith@secureguardi...

Mobile phone - primary: 67886 11867

Email: user@gmail.com

Email: user@whitegateconsulting...

CONTACT INFO

Type: Customer

Recipient's name: James

Title: Mr.

Preferred language: English (United States)

Owner: Christina Dela

Gender: Male

Addresses

	Address type	Full address	Primary
1	Business	3106, Philippines, Nueva Ecija, Central Luzon, Brgy. San Isidro Proper, Purok 4, Maharli...	☒

Job experience

	Account	Full job title	Department	Current	Start
1	Secure Guard Insurance	Business Analyst		☒	1/9/2025



Insurers CRM - Sales

- Manage the full sales cycle with AI-driven tools
- Visualize pipelines and forecast revenue
- Generate quotes and proposals instantly
- Track insurer performance and conversion rates

The screenshot displays the 'Secure Guard Insurance' CRM interface. On the left, a sidebar contains navigation icons. The main content area is divided into sections for customer information, lead management, and product management.

Customer Information:

- Primary contact: [James L Smith](#)
- Type: Customer
- Category: Select category
- Industry: Insurance
- Phone - primary: 66875699
- Email - primary: sradha.dash@whitegatecon...
- + Add communication option

Primary contact details:

- James L Smith
- 1/13/1993 - 33
- Philippines

Lead Management:

QL/SQL + ↺ ⋮ 🔍

Lead	Customer need	Lead stage	Owner	Crea
1 / James L Smith, Secure Guard Ins...		Marketing qualified lead	Christina Dela	2/3/2026 6:16
2 / James L Smith, Secure Guard Ins...		Marketing qualified lead	Christina Dela	2/3/2026 6:16
3 Need for our services / William M, ...	Need for our services	Marketing qualified lead	Christina Dela	10/8/2025 5:2

☒ Recommended products

Quotations: + ↺ ⋮ 🔍

Policy: + ↺ ⋮ 🔍

Policy ID	Type	Status	Date...	Amount	Owner
1 ST-0047	New	Active	1/13/2026	1.00	Christina Dela
2 ST-0040	New	Active	10/7/2025	0.00	Christina Dela
3 ST-0048	New	Active	1/13/2026	1.00	Christina Dela
4 ST-0052	New	Active	2/3/2026	130.000.00	Christina Dela

Invoices: + ↺ ⋮ 🔍

Number	Payment status	Amount	Currency	Order
1 INV-76	Paid	16,250.00	PHP	
2 INV-74	Paid	31,100.00	PHP	
3 INV-72	Paid	130,000.00	PHP	
4 INV-70	Paid	130.000.00	Euro	



Insurers CRM - Service

- Handle client queries and policy servicing
- Access full customer history with 360° view
- Recommend next-best actions using AI
- Monitor SLAs and resolution timelines

The screenshot displays the 'Secure Guard Insurance' CRM interface. The left sidebar contains navigation icons for various functions. The main content area is divided into two sections: account details and claims.

Account Details:

- Secure Guard Insurance**
Secure Guard
Philippines
- Lead conversion score: 0
- Owner: Christina Dela
- Account ID
- Primary contact: James L Smith
- Type: Customer
- Category: Select category
- Industry: Insurance
- Phone: primary

Claims Table:

Claim No	Subject	Assignee	Status	Resolution t
2 SR00000609	Comprehensive Motor Insur...	James L Smith	Closed	2/6/2026 2:00 AM
3 SR00000607	Full healthcare protection fo...	James L Smith	Closed	
SR00000606	Death Claim – Group Life As...	James L Smith	Closed	
5 SR00000605			New	

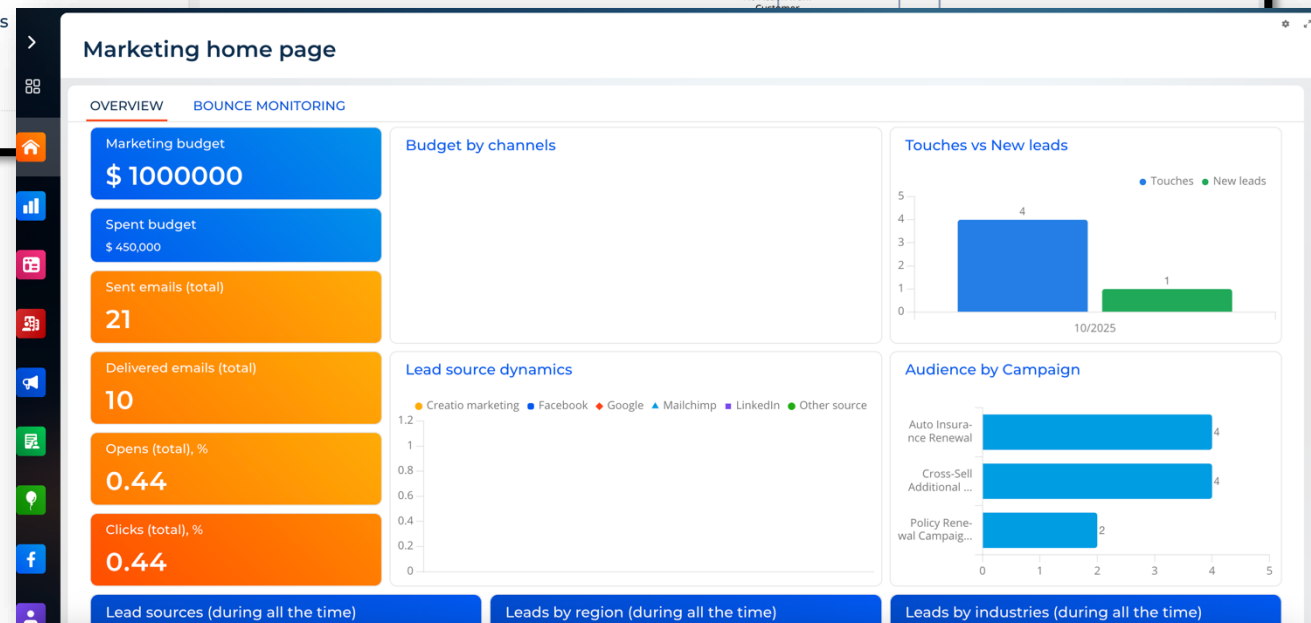
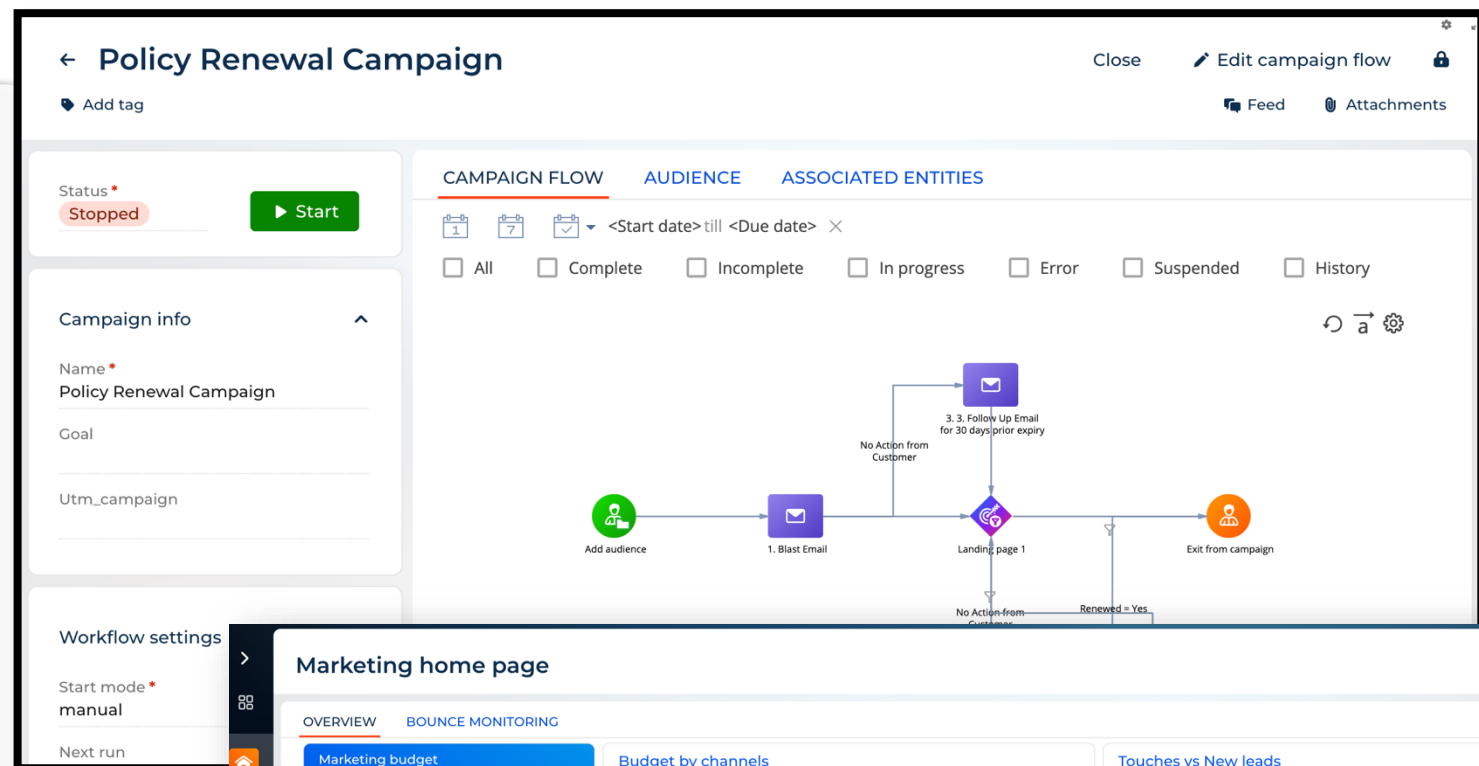
Service agreements Table:

Service agreement	Status	Owner
No data		



Insurers CRM – Marketing & Renewal Engine

- Be where the customers are – Social Media, Channels, Embedded Insurance and events.
- Launch targeted campaigns for renewals, upselling, and acquisition
- Segment audiences by behavior and policy stage
- Track campaign performance with real-time analytics
- Personalize outreach based on client data





Seamless Outlook Integration

- Users can send emails directly from within the platform
- Emails sent using the user's configured Outlook mailbox
- No need to switch between systems

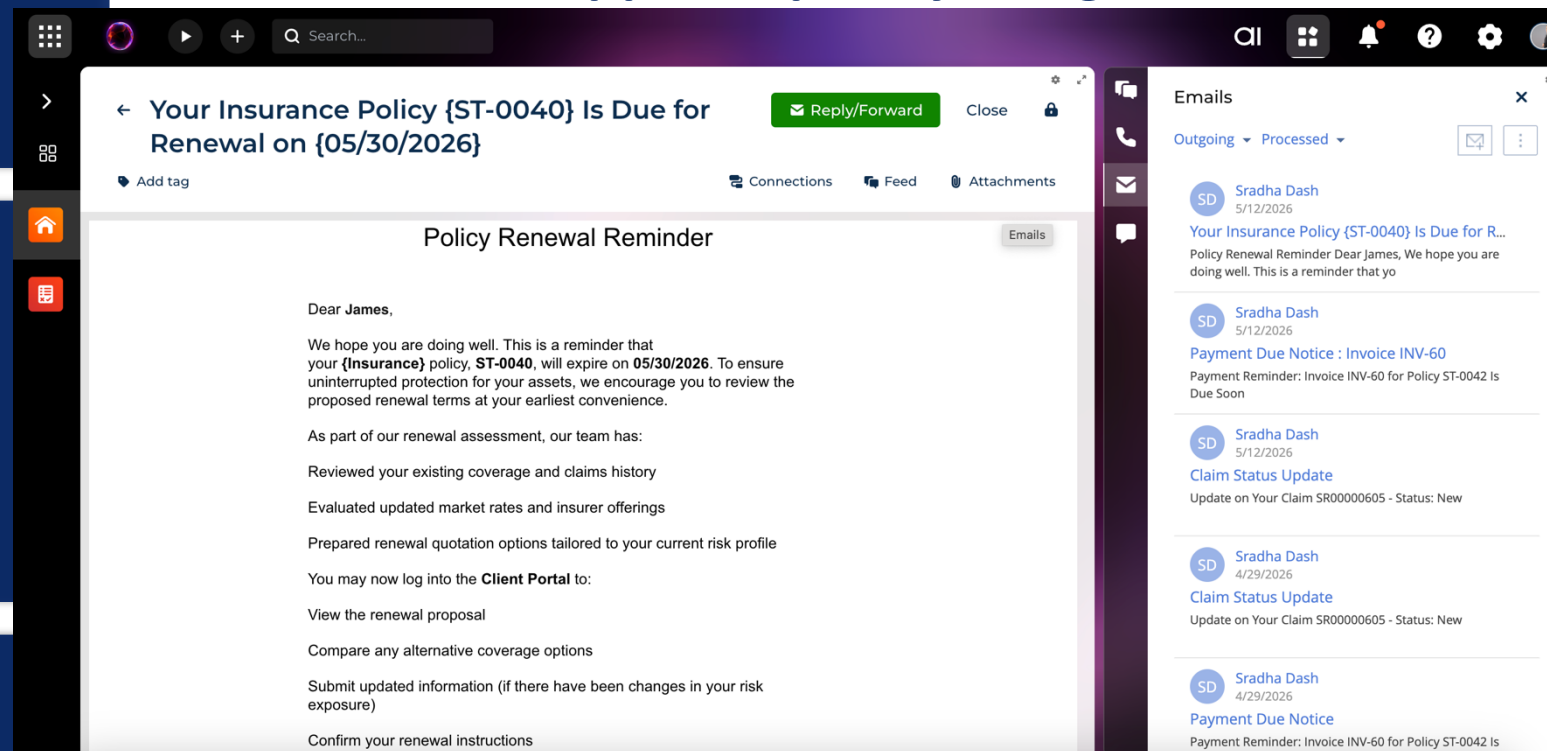
Integrated Communication Workflow

- Send quotation summaries, policies, and claim updates directly from the system
- Attach documents and communicate with customers in real time
- Send quotation summaries, policies, and claim updates directly from the system

Email Templates & Automation

- Predefined templates for common communications
- Auto-populate details such as:
 - Policy number
 - Insured name
 - Product details
- Ensures consistency and faster communication

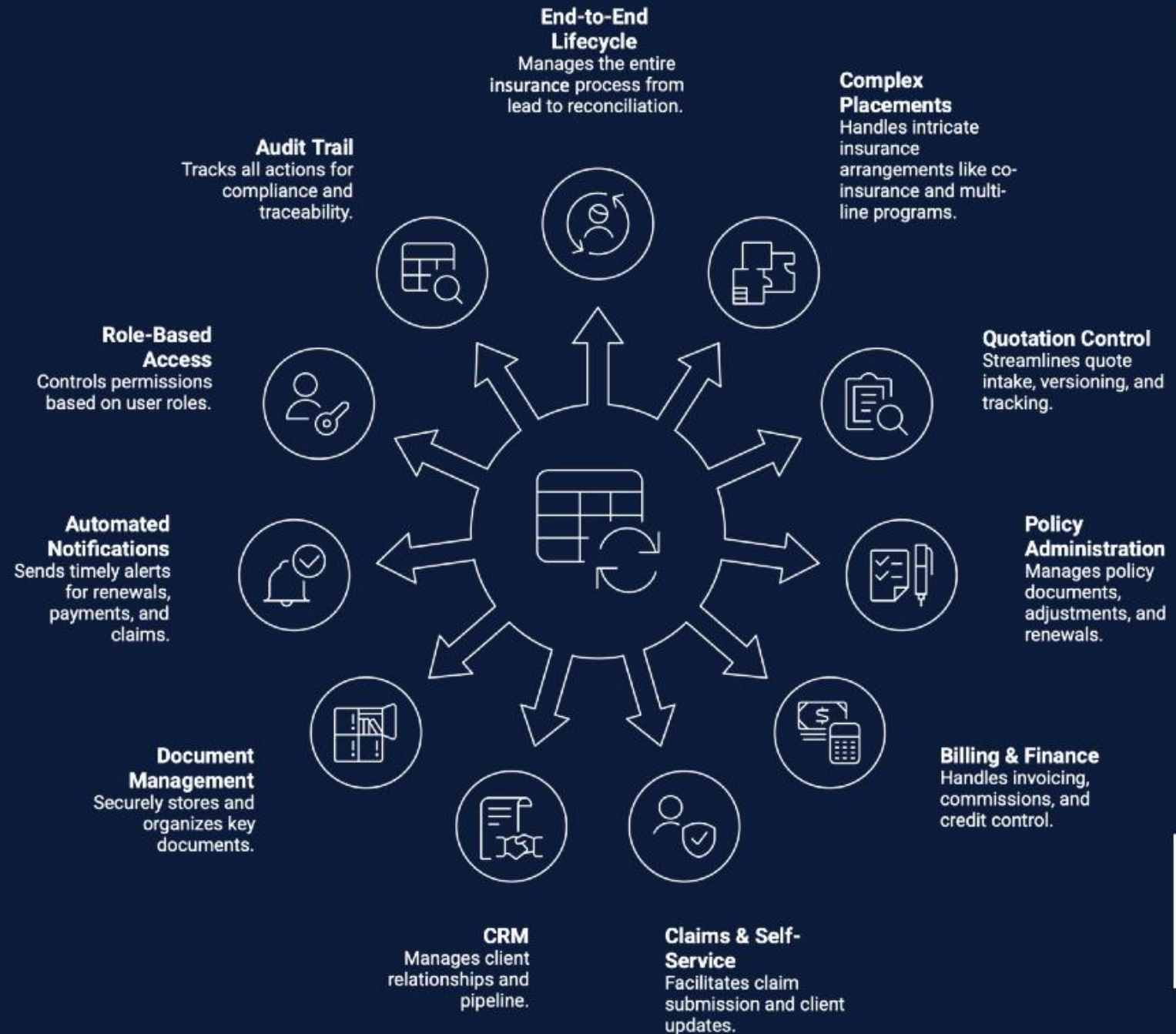
Intelligent Touchpoints - Outlook/WhatsApp/Telephony Integration





Back-Office Capabilities & Demo

Core Insurance





Embedded Document Management

- All documents are managed directly within the platform
- No dependency on external document management systems
- Documents linked to:
 - Quotations (Quote Summaries)
 - Policies (Debit Notes, Credit Notes, Policy Documents)
 - Claims (Checklist documents, Required Documents for Cla)

Centralized Storage & Accessibility

- Single repository for all transaction-related documents
- Documents stored and accessible at record level (Quote, Policy, Claim)
- Supports upload, download, and version visibility

The image displays two overlapping document windows from a web application. The top window, titled 'Quotation Summary - Motor. Quote Summary -0 _ QT-...', shows a 'Quotation Summary for QT-0262'. It contains a table with columns: Insurers, No of Vehicle, Total Sum Insured, Total Premium, Subjectivities, and Extensions. Below this is a 'Market Engagement Analysis' section with a table showing 2 quotes requested, 2 received, and 0 declinatures. The bottom window, titled 'Premium Sheet - Motor. ST-0054 (1) (4).docx', shows a 'Premium Sheet for Policy - ST-0054'. It lists policy details: Insured (Secure Guard Insurance), Risk Type (Comprehensive Motor), Policy No (ST-0054), and Period of Cover (1/15/2026 - 1/14/2027). Below this is a table with columns: Sr No, Vehicle Make, Registration No., Chassis No, Engine No, Sum Insured, Rate, and Annual Premium. Both windows have a toolbar at the top with zoom and navigation icons. A 'Powered By Apryse' watermark is visible at the bottom of the windows.

Quotation Summary - Motor. Quote Summary -0 _ QT-...

Quotation Summary for QT-0262

Insurers	No of Vehicle	Total Sum Insured	Total Premium	Subjectivities	Extensions
Pacific Assurance Ltd	1	650,000.0	16250.00	N/A	N/A
Liberty Insurance	1	650,000.0	16900.00	N/A	N/A

Market Engagement Analysis:

Quotes Requested	Quotes Received	Quotes Declinature
2	2	0

Premium Sheet - Motor. ST-0054 (1) (4).docx

Premium Sheet for Policy - ST-0054

Insured: Secure Guard Insurance
Risk Type: Comprehensive Motor
Policy No: ST-0054
Period of Cover: 1/15/2026 - 1/14/2027

Sr No	Vehicle Make	Registration No.	Chassis No	Engine No	Sum Insured	Rate	Annual Premium
1	Kia Rio	KSF 209 DM	KNADR244M987 21345	G4LC6H982134	650000.00	2.50	16250.00



Quotation Management

- Generate quick, accurate insurance quotations using pre-filled client and product data
- Provide clear breakdowns of coverage, premiums, and terms
- Track quotation history and status across multiple lines of business
- Share summaries with clients and insurers for faster approvals

The screenshot displays the SIRRIUZ Quotation Management interface. The top form, titled 'QT-0262', is in the 'Quote development' stage. It includes a progress bar with stages: Qualification, Quote development, Proposal, Decision, and Closed won. The form contains sections for 'Contact person' (James L. Smith, Business Analyst), 'Policy Selection' (Standard Policy Type, General Insurance Product Category, Comprehensive Motor Insurance Narrative), and 'Policy Details' (Policy Start Date: 1/15/2026, Policy End Date: 1/14/2027, Risk Type: Comprehensive Motor, Insured Name: Secure Guard Insurance). The bottom form, titled 'Q-0058', is in the 'Completed' stage. It includes a progress bar with stages: Start and Completed. The form contains sections for 'GENERAL INFORMATION' (Opportunity Details: Pacific Assurance Ltd, Quotation Details - Motor) and 'Premiums' (Gross Premium: 16,250.00, VAT Amount: 243.75, Brokerage Amount: 3,250.00).

QT-0262

← Add tag

Next steps: Playbook, Feed, Attachments

Qualification > Quote development > Proposal > Decision > Closed won

Commit to forecast: ☐ New customer: ☒

Contact person

James L. Smith
1/13/1993 · 33 · Philippines

Full job title: Business Analyst

Email - primary: james.smith@secureguardinsura...

Mobile phone - prim: 67886 11867

Email: user@gmail.co

Email: user@whitega

Policy Selection

Policy Type: Standard

Product Category: General Insurance

Product: Motor Insurance - Third Party O...

Policy Start Date: 1/15/2026

Policy End Date: 1/14/2027

Number of Days: 365

Currency: PHP

Risk Type: Comprehensive Motor

Narrative: Comprehensive Motor Insurance

Interest: Kia Rio with Reg. No: KSF 209 DM

Insured Name: Secure Guard Insurance

Q-0058

← Add tag

Feed, Attachments

Start > Completed

Quote Ref. No: Q-0058

Opportunity: QT-0262

Status: Completed

Sum Insured: 650,000.0

No of Vehicle: 1

Product Type: Motor

#Premium: 16,250.00

GENERAL INFORMATION

Opportunity Details

Select Underwriter: Pacific Assurance Ltd

Quotation Details - Motor

No Claims Discount %	Premium Rate %	Tracker Discount %
10	2.50	2.5
Premium Rate Discount %	Brokerage Rate %	Brokerage Discount %
5	20.00	0.00
Gross Premium		Brokerage Amount
16,250.00		3,250.00
VAT %	VAT Amount	
7.5	243.75	
Subjectivities - I		
N/A		
Extensions		



Policy Management

- Manage issuance, endorsements, renewals, and cancellations
- Auto-generate documents and client communications
- Built-in compliance checks and validation
- Debit/Credit note automation with audit-ready records

The screenshot displays a web-based Policy Management system interface. The top window, titled 'ST-0054', shows a policy status flow: Draft → Awaiting Payment Ack... → Finance Approval → Generate Credit Note & ... → Approval → Generate Policy Summ... → Active. The policy details include: Contract info (Policy Number ST-0054, Type New, Policy Status Active, Owner Christina Dela, Date Issued 2/4/2026, Due Date 4/23/2026, Insurer Policy Number PO-6686-54, Endorsement Number END-0054), Amount 16,250.00 \$, Policy Start date 6/15/2025, Policy End date 9/28/2025, and Number of products 1. The bottom window, titled 'INV-76', shows an invoice with details: Number INV-76, Debit Note DN-131, Credit Note, Invoice Type UsrType 99751eca46, Payment status Paid, Payment amount 16,250.00, Amount 16,250.00, Currency PHP, Payment amount, base currency 0.00, and Amount, base currency 0.00. The invoice also includes a table of products: 1 Motor Insurance - Third Part... with a price of 16,250.00 and a quantity of 1.000. The interface includes a sidebar with various icons and a top navigation bar with a search bar and user profile.

ST-0054

← ST-0054

Close Register Claim

Feed Attachments

Draft Awaiting Payment Ack... Finance Approval Generate Credit Note & ... Approval Generate Policy Summ... Active

Contract info

Policy Number ST-0054

Type New

Policy Status Active

Owner Christina Dela

Date Issued 2/4/2026

Due Date 4/23/2026

Insurer Policy Number PO-6686-54

Endorsement Number END-0054

Amount 16,250.00 \$

Policy Start date 6/15/2025

Policy End date 9/28/2025

Number of products 1

GENERAL INFORMATION CLAUSES DEBIT NOTE CREDIT NOTE CONTRACT DETAILS APPROVALS DOCUMENTS

Quotation QT-0262

Approved Quote Q-0058

Account Secure Guard Insurance

*Underwriter Name Pacific Assurance Ltd

#Premium 16,250.00

Currency PHP

INV-76

← INV-76

Close

Feed Attachments Customer profile

Number INV-76

Debit Note DN-131

Credit Note

Invoice Type UsrType 99751eca46

Payment status Paid

Payment amount 16,250.00

Amount 16,250.00

Currency PHP

Payment amount, base currency 0.00

Amount, base currency 0.00

Premium 16,250.00

Payment Amount 16,250.00

Date 2/4/2026

Paid on 2/1/2026

GENERAL INFORMATION ADDITIONAL INFORMATION TIMELINE APPROVALS

Insured Secure Guard Insurance

Lead Insurer Pacific Assurance Ltd

Period From 1/15/2026

Period To 1/14/2027

Risk Type Comprehensive Motor

Interest Kia Rio with Reg. No: KSF 209 DM

Prod... Count: 1 Quantity (Sum): 1 Total (Sum): 16,250.00

Product Price Quantity

1 Motor Insurance - Third Part... 16,250.00 1.000

Payment Details

Attachments

Debit Note... 2/4/2026 45.3



Re-Insurance

- Separate workflows based on treaty type and lead status (e.g., leading vs. not leading)
- Auto-calculates premiums, commissions, and shares based on vendor inputs and class of business
- Handles multiple subclasses per business class with individual vendor share allocations
- Premiums and commissions are split across selected installments automatically

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Re-Insurance

Folders

Tag

Q Search

☐	Name	Created on	Created by
1	Pro - NL - 13-10-2025	10/13/2025 2:26 PM	Akash Patil
2	Treaty - Leading - Proportional	10/13/2025 3:16 PM	Akash Patil
☒	Non Proportional - 14-10-2025	10/14/2025 3:52 PM	Akash Patil
4	Non-Pro - Leading - 13-10-2025	10/13/2025 3:03 PM	Akash Patil
5	Pro-Lead 13-10-2025	10/13/2025 1:59 PM	Akash Patil

+ New

+ New

Import

Summary

<

Non Proportional - 14-10-2025

Generate Rendition

Submit

Close

Add tag

Start

Generate Debit Note

Confirm & Generate Credit Note

Approval

Name *

Non Proportional - 14-10-2025

Statement Type

Treaty

Re-Insurance Steps

Start

TREATY RE-INSURANCE

Re-Insured Name

Secure Guard Insurance

Treaty Statement Name

Re-Insurance Type

Non-Proportional

Lead Status

Leading

Interest

Quarter

Q2

Year

2025

Period

01st April 2025 to 30th June 2025

No of Installments

3

Treaty Non-Proportional Class Of Business

+ ↺ ⋮ Q

☐

Class Of Business

EGNPI

Re-Insurance

⌵

1

ENGINEERING SURPLUS

120,000.00

Non Proportional - 14-10-2...

+ New

Re-Insurance Vendor Details

+ ↺ ⋮ Q



Claims Management



Claims Management

- Smart FNOL intake with automated claim registration and routing
- Configurable end-to-end claims workflow
- Real-time claim tracking with automated notifications and follow-ups
- Structured document management aligned with insurer requirements
- Complete audit trail ensuring transparency, compliance, and control

The screenshot displays the SIRRIUZ Claims Management system interface. The top navigation bar includes a search bar, a close button, and icons for feed, attachments, and customer profile. The main header shows the claim ID 'SR00000609' and a progress bar with stages: New, Awaiting for Clai..., Awaiting Docum..., Adjuster Appoint..., Offer & Discharg..., Waiting for Signi..., Payment to Client, Waiting for respo..., and Closed. The left sidebar contains icons for various functions. The main content area is divided into sections: Terms, Case info, and Policy Details. The Terms section shows the assignee 'James L Smith', assignee group '3rd-line support', registration date '2/4/2026 12:54 PM', and claim status 'Closed/ Canceled'. The Case info section shows the account 'Secure Guard Insurance' and a dropdown menu for selecting a policy number. The Policy Details section shows the product 'Motor Insurance - Third Party Only', underwriter claim number 'UND - 779736-609', account 'Secure Guard Insurance', policy type 'New', premium amount '16,250.00', source 'Email', date of loss '1/30/2026', subject 'Comprehensive Motor Insurance - KSF 209 DM', description 'Kia Rio with Registration No. KSF 209 DM', and a list of covered risks. The bottom section shows the estimate of loss percentage '50.00' and net settlement amount '0'.

SR00000609

Close

Add tag

Feed Attachments Customer profile

New Awaiting for Clai... Awaiting Docum... Adjuster Appoint... Offer & Discharg... Waiting for Signi... Payment to Client Waiting for respo... Closed

Terms

Assignee
James L Smith

Assignees group
3rd-line support

Registration date *
2/4/2026 12:54 PM

Claim Closed/ Canceled

Remark for Closed/ Canceled

Assign to me

Case info

Account
Secure Guard Insurance

Select Policy No *
ST-0054

WGC Claim Number
ST-0054/CL38

Priority
Medium

SLA
Claim Resolution

Category
Service request

Service
Claims

Resolution time
2/6/2026 2:00 AM

Contact
James L Smith

GENERAL INFO CONVERSATION CASE LIFECYCLE POLICY CLAUSES PERFORMANCE CLOSURE AND FEEDBACK

Policy Details

Product
Motor Insurance - Third Party Only

Underwriter Claim Number
UND - 779736-609

Account
Secure Guard Insurance

Policy Type
New

Premium Amount
16,250.00

Source *
Email

Currency
USD

Date of Loss *
1/30/2026

Subject *
Comprehensive Motor Insurance - KSF 209 DM

Description
Kia Rio with Registration No. KSF 209 DM

The Company will indemnify the Insured for loss of or damage to the motor vehicle and its accessories arising from the following:

- Accidental collision or overturning, including mechanical breakdown-related overturning.
- Fire, external explosion, lightning, self-ignition, burglary, housebreaking, or theft.
- Malicious acts.
- Transit-related risks (including loading and unloading) by road, rail, inland waterway, lift, or elevator.
- Loss or damage to in-built accessories of the insured vehicle.

Additional Email
claims@secureguardinsurance.com

Estimate of Loss %
50.00

Net Settlement Amount
0

Document Type *
Private Motor



Structured Document Requirements

- Required document checklist defined per claim type (e.g. Motor claims)
- Standardized document requirements aligned with insurer assessment needs
- All claim documents stored within a centralized record
- Each document tracked with:
 - Claim number
 - Document name
 - Document Number
 - Remarks for validation or missing information

Document Submission & Validation

- Documents uploaded and mapped to specific checklist items
- Incomplete or incorrect documents flagged with remarks

The screenshot displays the SIRRIUZ system interface, which is used for managing claims and documents. The interface is divided into two main sections: a top section for claim overview and a bottom section for document details.

Top Section: Claim Overview (SR00000609)

- Header:** SR00000609, Add tag, Close, Feed, Attachments, Customer profile.
- Progress Bar:** New > Awaiting for Clai... > Awaiting Docum... > Adjuster Appoint... > Offer & Discharg... > Waiting for Signi... > Payment to Client > Waiting for respo... > Closed.
- Required List of Document:** A table listing required documents for the claim.

Document No	Document Name	Remark
1 D-0336	Any other supporting documentation	
2 D-0333	Any other supporting documentation	
3 D-0338	Certificates, Vehicle License, Ignition Keys.	
4 D-0344	Completed Accident Claim Form – Underwriters	

Bottom Section: Document Details (D-0336)

- Header:** D-0336, Add tag, Close, Feed, Attachments.
- GENERAL INFORMATION:** A form for entering document details.

Field	Value
Claim	SR00000609
Document No	D-0336
Document Name	Any other supporting documentation
Document Received?	Yes
Remark	

Attachments: A section for uploading documents, featuring a "Drop files here" area and an "Upload" button.



End-to-End Claim Timeline Visibility

- Complete tracking of claim lifecycle from **registration to closure**
- Key milestones captured with timestamps:
 - Registration and Loss Date
 - Insurer notification and acknowledgement
 - Document submission and validation
 - Discharge voucher issuance and Payment and settlement dates

Audit & Compliance

- Full **time-stamped audit trail** of all claim events
- Supports compliance, dispute resolution, and reporting
- Enables clear visibility for insurer review and governance

← SR00000609

Close

Add tag

Feed Attachments Customer profile

New Awaiting for Clai... Awaiting Docum... Adjuster Appoint... Offer & Discharg... Waiting for Signi... Payment to Client Waiting for respo... Closed

Claim Timeframe

Registration date *	2/4/2026 12:54 PM	Response time	2/4/2026 8:41 PM	Actual response time	2/4/2026 12:56 PM
Resolution time	2/6/2026 2:00 AM	First resolution time	2/4/2026 12:56 PM	Actual resolution time	2/4/2026 8:01 PM
Loss Date *	1/30/2026	Insured Notification Date	1/30/2026	Insured Response Date	2/4/2026
Underwriter Notification Date	2/4/2026	Docs Received From Insured	2/4/2026	Docs Sent to Underwriter	2/4/2026
Underwriter Acknowledgement On	2/4/2026	DV Received (Underwriter)	2/3/2026	DV Sent (Insured)	2/4/2026
Executed DV Received	2/4/2026	Executed DV Sent	2/4/2026	Payment Received (Underwriter)	2/4/2026
Settlement Date	2/4/2026	Payment Sent (Insured)	2/5/2026		
Closed on	2/4/2026 8:01 PM				



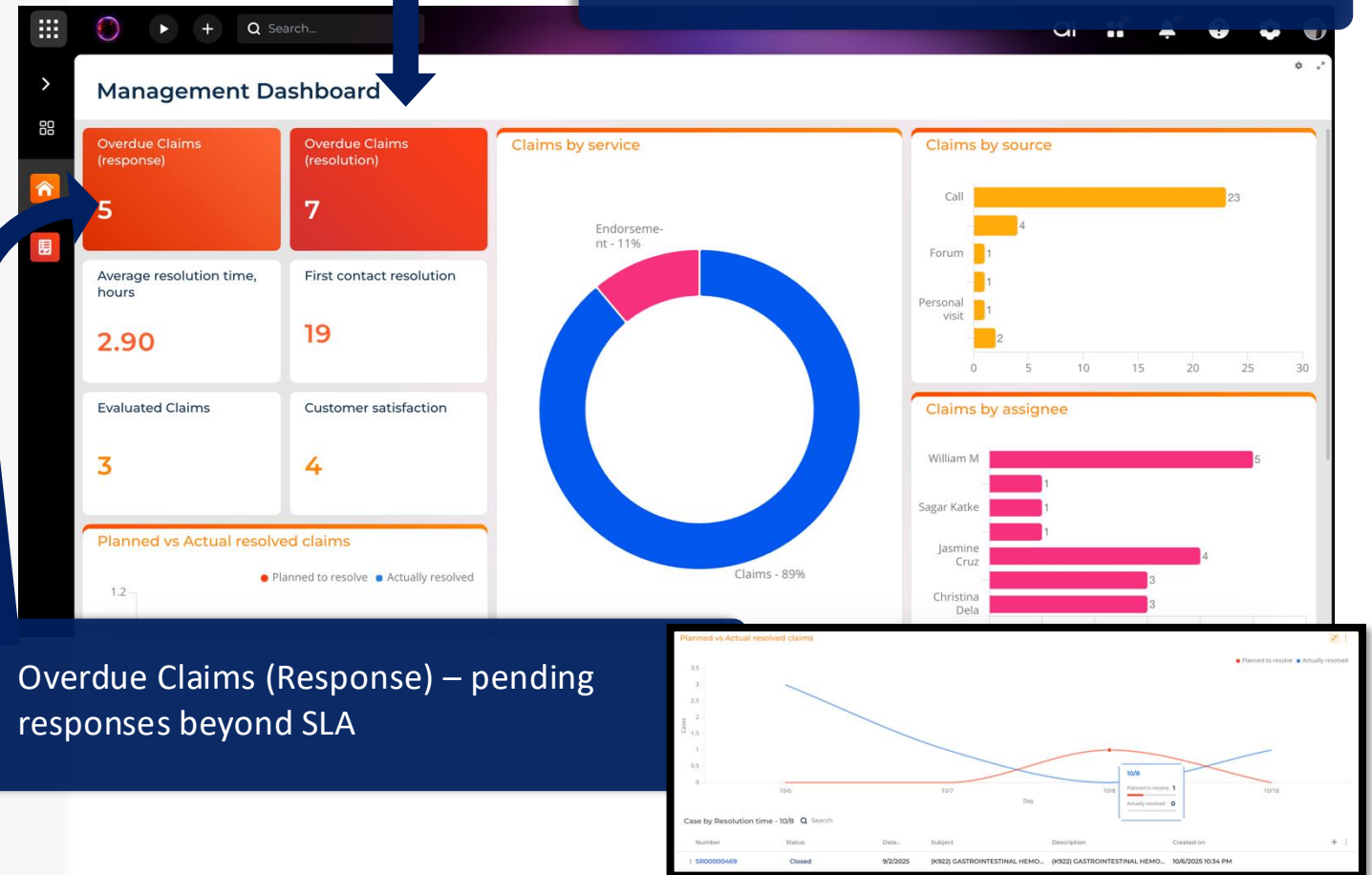
Management Dashboard

Real-Time Claims Visibility

- Centralized dashboard for end-to-end claims monitoring
- Provides a live view of claim volumes, statuses, and operational performance
- Supports both management oversight and operational tracking

Interactive & Configurable

- All charts and metrics are fully drill-down enabled
- Users can navigate from KPIs directly to claim records
- Dashboard components are configurable using drag-and-drop tools
- Supports custom analytics without development effort
- Any claim list or dashboard view can be **exported to Excel**
- Larger migrations can be handled via APIs or database-to-database transfers.





Self Service – Customer/Business Portal

- Secure, branded portal for policy access and claim submission
- Real-time sync with backend systems
- Mobile-friendly and customizable visibility controls
- Reduces manual support and improves transparency

The screenshot displays the Self Service Customer/Business Portal interface. It features a sidebar with navigation options: Claims, Policy Documents, and Knowledge base. The main content area shows a 'Claims' section with a table of claims and a 'Policy Document' section with a list of attachments.

Claims Table:

Number	Policy No	Admission Diagnosis	Status	Date of Admission
1. SR00000517	ST-0024	Accidental damage	New	4/1/2025
2. SR00000527	ST-0024	Helath Issue	New	10/8/2025

Policy Document Section:

Policy ID: ST-0024

Attachments:

- Policy Summary... (7/23/2025, 34.6 KB)
- Premium Sheet - ... (7/23/2025, 35.1 KB)

Claim Form (Top):

Number: SR00000517

Select Policy No: ST-0024

Subject: Accidental damage

Date of Incident: 4/1/2025

Status: New

Description: Collision with car - Bone fractured

WGC Claim Number: ST-0024/CL25

Product: Life & General Assurance I

Policy Start Date: 5/1/2024

Policy End Date: 4/30/2025



AI Agents



Email-to-Quotation Generation Agent

➤ Automates conversion of inbound emails into accurate, compliant insurance quotations, reducing response time and improving sales conversion.

➤ AI Agent Capabilities

- Email Intent &. Data Extraction
- Automated Quote Generation
- Sales Workflow Enablement
- Validation & Clarification Handling

➤ **Business Impact:** Accelerates quote turnaround, improves lead-to-policy generation, reduces manual effort, and ensures pricing and underwriting compliance.

Quotation Generation Agent CreateWe would like to request a quotation for a motor insurance policy with the following details: Company Name: Secure Guard Insurance Contact Person: William M Email: William.manns@secureguardinsurance.com Phone: 77469936 Type of Policy: Motor Insurance Product Category: Motor Insurance Coverage Period: 1 April 2026 to 31 December 2026 Risk Type: Motor We are looking for coverage that includes accidental damage, third-party liability, and natural disaster protection for our vehicle. Kindly share the estimated premium along with any additional services or benefits available under the policy. Preferred Currency: EUR

2:13 PM

Quotation Generation Agent

Thank you for providing the details for your motor insurance quotation request. I will now extract the relevant information and initiate the process to create an Opportunity in Creatio on your behalf.

Here is a summary of the provided information:

- Company Name: Secure Guard Insurance
- Contact Person: William M
- Email: William.manns@secureguardinsurance.com
- Phone: 77469936
- Type of Policy/Product Category: Motor Insurance
- Coverage Period: 1 April 2026 to 31 December 2026
- Risk Type: Motor
- Requested Coverage: Accidental damage, third-party liability, natural disaster protection

← QT-0290

Close Submit

Next steps Playbook Feed Attachments

Qualification Quote development Proposal Decision Closed won

OVERVIEW QUOTE DETAILS PRODUCTS OPPORTUNITY INSIGHTS PROCESSING HISTORY

Quotation No# * QT-0290

Stage * Qualification

Amendment 0

Total contract value 0.00 Expected close date

Commit to forecast New customer ☒

Contact person

William M
3/15/1973 - 53
7:06 PM - Malaysia

Full job title
Business Analyst

Email - primary
William.manns@secureguardinsu...

Mobile phone - primary
77469936

Probability 0 %

Emails sent 0

Outgoing calls 0

Days in funnel 0

Days in stage 0

Customer need Additional service

Contact * William M

Assignees group

Created on 3/25/2026 2:15 PM

Account * Secure Guard Insurance

Sales channel

Owner * Ashish Rawal

Policy Selection

Policy Type General Insurance

Product Category General Insurance

Product Motor Insurance - Comprehensive

Policy Start Date 4/1/2026

Policy End Date 12/30/2026

Number of Days 274

Currency Euro

Risk Type Comprehensive Motor

Narrative

Interest %

Insured Name Secure Guard Insurance



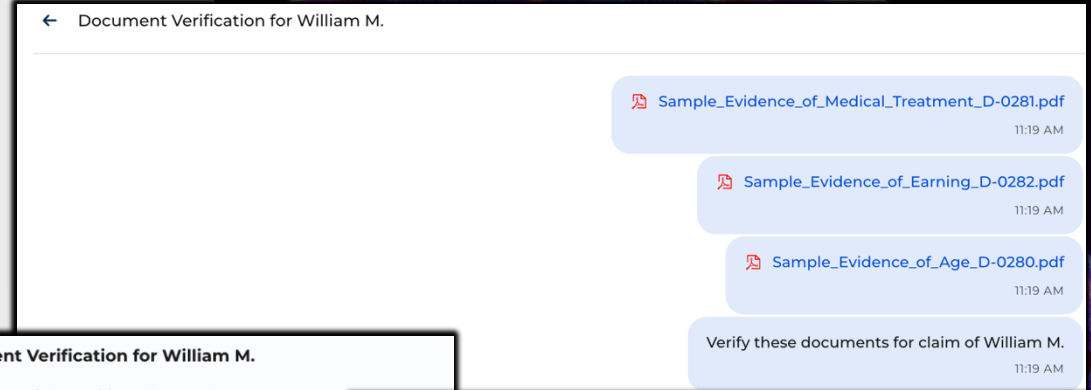
AI Agent : Claim Document Verification

- Automates verification of mandatory claim documents to enable straight-through processing, reduce manual dependency, and ensure policy and regulatory compliance.

➤ AI Agent Capabilities

- Document Completeness Check
- Automated Data Extraction
- Cross Document Consistency
- STP Enablement & Exception Routing

- Business Impact: Improves claim accuracy and turnaround time, reduces fraud and rework, lowers operational costs, and ensures audit-ready compliance.



Claim Document Verification for William M.

1. Evidence of Age – Birth Certificate (D-0280)

- **Document Type:** Birth Certificate
- **Extracted Fields:**
 - Full Name: William M.
 - Date of Birth: 15 March 1972
- **Customer 360 Fields Used for Validation:**
 - Full Name: William M
 - Date of Birth: 15 March 1973
- **Matched Fields:**
 - Full Name (matches)
- **Unmatched or Missing Fields:**
 - Date of Birth (document: 15 March 1972 vs. record: 15 March 1973)
- **Document Verification Result:** Needs Review (Date of birth mismatch)

2. Evidence of Earning – Salary Certificate (D-0282)

- **Document Type:** Salary Certificate
- **Extracted Fields:**
 - Employer: Secure Guard Insurance
 - Job Title: Business Analyst
- **Customer 360 Fields Used for Validation:**
 - Account: Secure Guard Insurance
 - Job Title: Business Analyst
- **Matched Fields:**
 - Employer
 - Job Title
- **Unmatched or Missing Fields:** None
- **Document Verification Result:** Fulfilled

3. Evidence of Medical Treatment – Hospital Discharge Summary (D-0281)

- **Document Type:** Hospital Discharge Summary
- **Extracted Fields:**
 - Hospital Name: Kuala Lumpur General Hospital
 - Admission Date: 05 January 2026
 - Discharge Date: 10 January 2026
- **Customer 360 Fields Used for Validation:**
 - Not required for medical documents
- **Matched Fields:**
 - Hospital Name
 - Admission and Discharge Dates
- **Unmatched or Missing Fields:** None
- **Document Verification Result:** Fulfilled

Summary Checklist

Required Document	Status
Evidence of Age (D-0280)	Needs Review
Evidence of Earning (D-0282)	Fulfilled
Evidence of Medical Treatment (D-0281)	Fulfilled

Conclusion:

- All documents were identified and most are complete.
- There is a mismatch in the date of birth on the birth certificate versus the Customer 360 record for William M.
- Please clarify or provide corrected documentation for the date of birth to fulfill all claim requirements.

You can review William M.'s record directly in Creatio: [William M](#)



AI Agent : Document Verification

- Automates death certificate verification to accelerate claim settlement, reduce anomalies, and ensure regulatory compliance.
- **AI Agent Capabilities**
 - Automated Document Validation
 - Cross-System Reconciliation
 - Policy & Nominee Reconciliation
 - Straight-Through Processing (STP)
- **Business Impact:** Accelerates claim settlement, reduces fraud and leakage, lowers operational costs, enhances customer experience, and ensures audit-ready compliance.

Document Verification Process

Death Certificate Sample.pdf
11:36 AM

Verify the document for William M.
11:36 AM

Insurance Claim Verification Agent

Death Certificate Verification Result for William M.:

- **Full Name:** William M (matches system record)
- **Date of Birth:** 15 March 1973 (matches system record)
- **Mobile Number:** 77469936 (matches system record)

Verification Status:
All required details on the death certificate match the Customer 360 record for William M. This document is successfully verified for insurance claim processing.

You can review the Customer 360 record here:
[William M](#)

11:36 AM



AI Agent : Claim Anomaly Detection

- Automates fraud risk assessment of insurance claims by analysing claim data, policy details, and customer history to identify anomalies and suspicious patterns, enabling faster and more reliable claim evaluation.
- **AI Capabilities:**
 - Fraud Risk Detection & Scoring
 - Multi-Source Data Analysis
 - Anomaly & Pattern Identification
 - Investigation Recommendation
- **Business Impact:** Enables early detection of potentially fraudulent claims, reduces financial losses and leakage, improves operational efficiency, supports faster decision-making for claims teams, and ensures consistent, data-driven fraud assessment across the organization.

Claims Fraud Flag Agent Check fraud risk for claim SR00000609

2:27 PM

Claims Fraud Flag Agent

Fraud Risk Assessment:

Claim ID: SR00000609

Fraud Risk Level: Medium

Fraud Score: 60%

Detected Indicators:

- Incident date (2026-01-30) occurs very shortly after the policy start date (2026-02-04)
- Claim Amount is relatively low, but there is a zero settled amount so far
- Claim status and key resolution fields are missing or left blank
- Document: "Claims Facing Sheet. SR00000609 (1) (2).docx" received, but further consistency check would be needed based on document content

Analysis Summary:

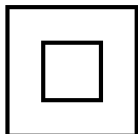
The incident date is reported just before the policy's official start date, which may indicate a potential timing anomaly or coverage issue. The claim amount is not excessive, but missing settlement information and incomplete processing details raise moderate suspicion. To complete the assessment, document verification and cross-check of all data are advised.

Recommendation:

- Review manually to clarify incident timing, confirm document consistency, and check for policy validity.

You can access the claim record here:

[SR00000609](#)



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FINANCIAL SERVICES. CONSULTING & DELIVERY



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