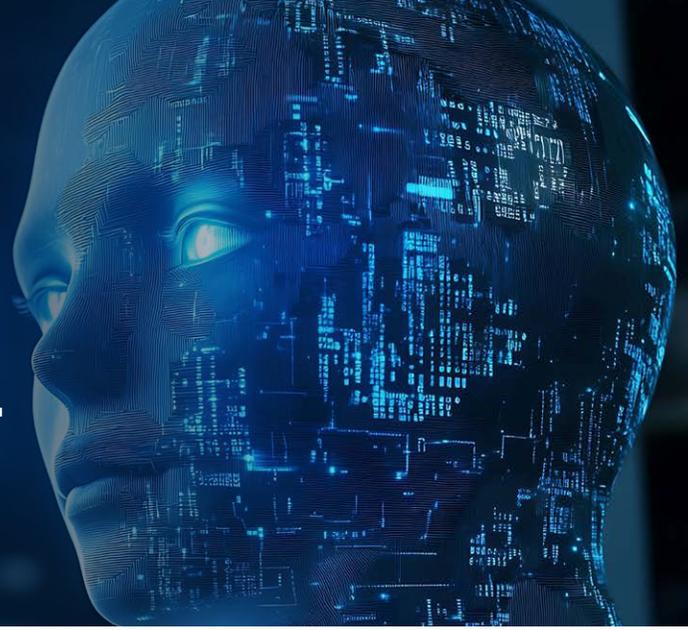


# Modernize with AI-powered product recommendations for smarter cross-selling



## Key challenges with legacy systems

Limited visibility into clients' evolving needs and risk appetite



Fragmented tools and outdated workflows hinder client engagement



Manual effort to identify relevant products slows down the sales cycle



Difficulty in delivering personalized experiences that boost loyalty



Missed opportunities for cross-sell and upsell due to lack of insights



## The solution: Broker Assist by Visionet

An AI-powered recommendation engine that transforms how brokers work—enabling faster, smarter, and more personalized product offerings.

### Core features:



#### Insured persona insights

Analyzes customer behavior, demographics, and risk profiles for deeper understanding



#### Smart product matching

Recommends highly relevant coverage options tailored to individual client needs



#### Sales acceleration

AI-backed suggestions help brokers close deals faster



#### Hyper-personalized client experience

Builds trust and improves retention through tailored product journeys

# Business impact

## Higher conversion rates

Brokers offer the right product at the right time, increasing policy uptake



## Increased client retention

Personalized experiences lead to stronger, longer-lasting relationships



## Optimized cross-selling

AI uncovers hidden opportunities to expand coverage per client



## Productivity boost

Less time researching. More time selling



# Real-world impact

“ A specialty insurer in the UK boosted cross-sell opportunities by 25% by implementing our AI recommendation engine. ”

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