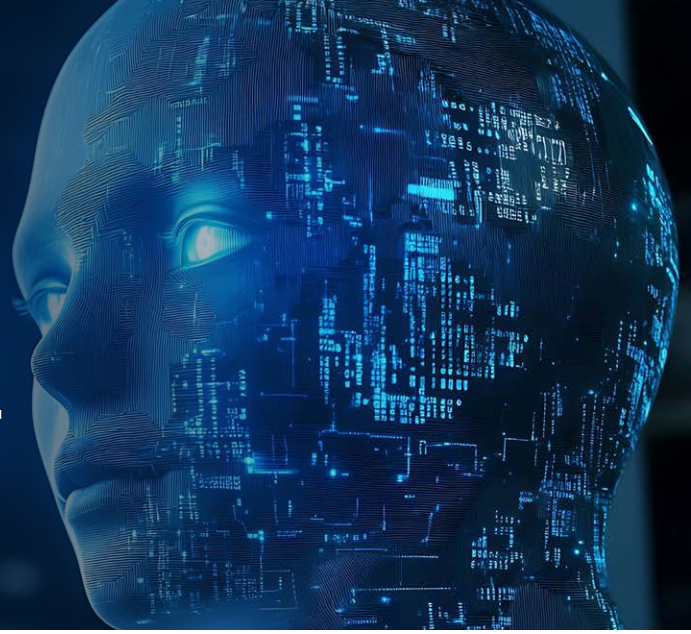


Modernize with AI-powered product recommendations for smarter cross-selling



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outdated workflows hinder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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