Charles Taylor InsureTech

Bordereaux Sync

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Less manual. More meaningful.
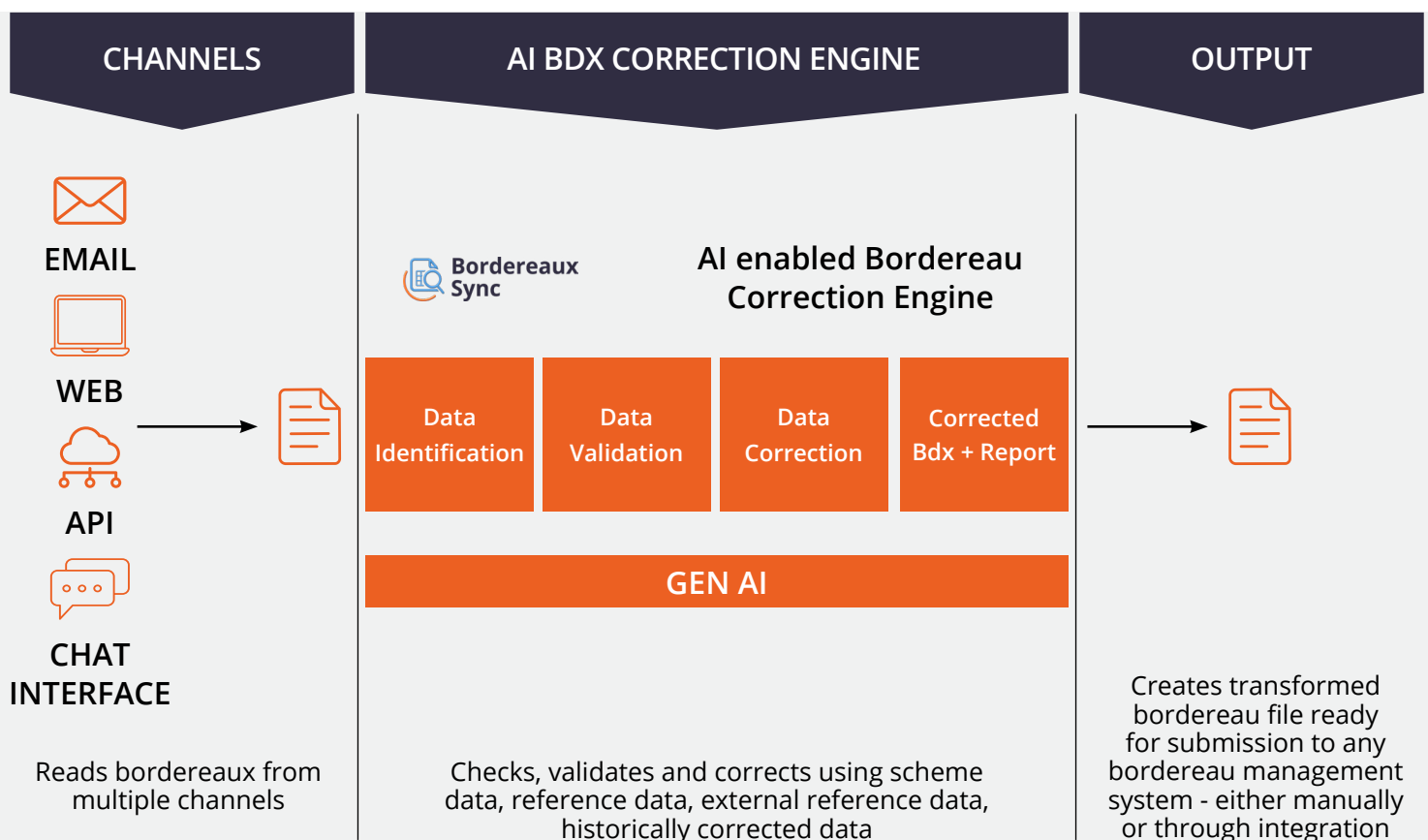## Always aligned. Always accurate.

Bordereaux Sync is a new AI-powered digital assistant that cleans and repairs bordereaux data. Developed by Charles Taylor InsureTech in partnership with Microsoft, the tool deploys agentic and generative AI to make bordereaux management less time consuming and more accurate.

By reducing manual processing and providing more accurate, meaningful data at the start of bordereaux journeys, Bordereaux Sync helps the entire value chain keep operating costs down and take better business decisions.

HOW DOES IT WORK?

Bordereaux Sync is a SaaS solution that checks and validates data before it is imported into a bordereaux management platform.

1. The tool proactively corrects mismatched country/ address details, mismatched currencies, and other errors at the start of bordereaux journeys.

2. If Bordereaux Sync spots a data error it cannot correct, it contacts the sender, highlights the issue and requests the right data.

3. Once the new data is supplied, Bordeaux sync corrects the bordereau file.

CHANNELS	AI BDX CORRECTION ENGINE	OUTPUT

EMAIL

WEB

API

CHAT INTERFACE

Reads bordereaux from multiple channels

Bordereaux Sync

AI enabled Bordereau Correction Engine

Data Identification	Data Validation	Data Correction	Corrected Bdx + Report

GEN AI

Checks, validates and corrects using scheme data, reference data, external reference data, historically corrected data

Creates transformed bordereau file ready for submission to any bordereau management system - either manually or through integration

KEY FUNCTIONALITY

Notifies the user if financial anomalies are present. Handles all types, sizes and formats of bordereaux.

Uses agentic AI (harnessing machine/natural language learning) to analyse and make intelligent decisions.

Enables users to configure AI to achieve specific checks and outputs.

Includes a feedback loop to help improve the system via the versatile and intuitive interface.

WHO CAN USE BORDEREAUX SYNC?

As standalone technology, Bordereaux Sync can help anyone in the bordereaux value chain and will convert data to version 5.2 of Lloyd's Coverholder Reporting Standards, promoting standardisation and straight-through processing as well as data accuracy. The tool is the perfect complement to Tide, Charles Taylor's bordereaux management platform, and works equally well with other bordereaux systems.

THE AI ADVANTAGE

Bordereaux Sync draws on the combined strengths and versatility of generative AI and agentic AI. Generative AI is continually evolving and is already shaping many insurance processes. It streamlines bordereaux by automating and refining the flow of data and reducing manual processing. Agentic AI, a new frontier for artificial intelligence, facilitates proactive data screening and autonomous decision-making.

KEY BENEFITS

Efficient and accurate bordereaux processing.

Reduced operating costs through increased accuracy and improved straight-through processing due to automation and standardised formatting.

Avoids the transfer of incorrect or incomplete data to a downstream business intelligence solution.

Functionality will continue to improve because Bordereaux Sync is built on fast-evolving AI.

Converts bordereau to the Lloyd's 5.2 Coverholder Reporting Standards.

Compatible with any bordereaux management system and by anyone in the bordereaux value chain (insurers, reinsurers, MGAs, etc).

To find out more or book a demo

Contact us ❯