Auto Casualty, General Liability, Workers' Comp

# Automate the Chaos: AI, Dashboards, and the Future of Claims

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Get a deep dive into how automation, AI, and dynamic dashboards are shaping the future of claims management. Learn how these advanced technologies are accelerating insights, enhancing productivity, uncovering key trends, and empowering teams to deliver stronger outcomes.

**Jim Harris (JH):** So now I want to talk a little bit about how we are integrating advanced analytics and AI into the claims management process to really help make things more efficient and again help to reduce that chaos.

**Rebecca Morgan (RM):** Well, yeah, AI. We talked about it a little bit earlier and it's just absolutely critical and booming in terms of our ability to leverage it. The potential is enormous here.

So how are we leveraging it today? Well, we talked a little bit about it already, but interrogating medical records is really important. That's if you've got thousands of pages of medical records, no human is ever going to be able to consume that. But we can use AI to consume it and then ask it questions and draw out salient points.

We can use AI to help us predict when a human needs to touch something and when a human does not. For instance, medical bills flowing through the system. Which medical bills are within treatment guidelines? We

don't see any anomalies on them and when is something going off the rails that we need a human to intervene? That's an excellent use case for AI as well.

Highlighting relevant data for claims professionals, drawing it out of that unstructured data, whether that's medical records or claim notes, but surfacing it then to the user in a way that draws their attention. And they can start to act on that information.

And the last thing that I'll say here about AI, which is going to be a benefit throughout our industry, and throughout every industry, is that technology solutions are developed in less time now. Now our software developers are using AI to help generate code. Putting their human -- they have to look at it and validate it and such, but they can develop software solutions in much less time than they used to, and that allows the technology arm of our organization to deliver solutions to our customers faster and better than we ever have.

And that means we're going to start to see an acceleration. It's about accelerating the data and accelerating the technology solutions that support it. It all comes together in this beautiful package that's going to really drive the process of claims management forward.

**JH:** Yeah, there's so many use cases for AI and it can sometimes be a little bit intimidating to start that process, but once you get into it, people are fully invested in AI and how it can make everything better.

**RM:** We're hooked on AI over here, aren't we?

**JH:** We are.

**RM:** Well, Jim, a question for you. Are there any specific data visualizations or dashboards that can help clients make quicker decisions and maintain better control over the claims process?

**JH:** I think sometimes when people are like, hey, we've got a new dashboard for you people will sometimes roll their eyes or like ugh, not another one. I think when you start talking about data visualization and tools, it's so important that it's meaningful and actionable for users. And I think we've got a lot of examples within our organization of all kinds of different dashboards.

I even consider our claims examiner portal to be a dashboard tool where adjusters can go in and see what are the bills that are waiting to be approved and processed and how do they relate to the injury?

We talked about the blue man visualization of the body parts. Again, visualizing what is an authorized body part versus a non-authorized body part is quick and easy for them to see. And then taking steps back and looking at the larger programs, trending information is so important, and that's where dashboards and visualization can really come in handy. Whether it's how am I performing versus previous quarters, previous years, different things like that. Making sure that you have a tool that can house enough data to be able to really look at these trending things, whether it's real-time claims activities or larger program decision-making tools as well.

**RM:** Yeah, it's about surfacing insights. We do that at a claim level, but we also do that at the macro level, looking across those trends. Well, Jim, how do you use data to manage expectations and improve communication with clients or injured parties?

**JH:** So one of the things that my team, a huge component of what we do is conducting and performing annual and quarterly partnership meetings with our customers where we are taking the time to really take a step back, gather all the data from all the different programs that may be involved, and not only showing what Enlyte is doing for those customers, but also hopefully identifying actual opportunities to potentially improve the

programs.

Whether it is implementing other products, or other services, whether there are trends in their injuries or things along those lines that can really help them make decisions on their cases and hopefully help drive down those costs. We get a ton of great feedback during these processes, and I think it's so important to stop and take the time to see what's going on so you can move forward.

**RM:** You know, I've watched that happen with our customers utilizing those dashboards and the insights that they get are crazy good. They're able to make decisions about what they need to do to change the trajectory of their programs, because they can see the data and the trending at a macro level. It's really, really insightful. Well, Jim, can you share any examples or case studies where the use of data led to significant improvements in workflow? Or reduce time spent on handling claims?

**JH:** I'm going to share one of my favorite stories of all time and it really started with the partnership process.

We were working with this large customer. We saw year over year that they were having increased injuries for shoulders and the cost of these shoulder injuries were skyrocketing because there were a lot of surgeries taking place. Costs were rising on the medical side with the cost of the surgeries, but also on the indemnity side for the amount of time that these injured workers were losing time from work.

And so from this partnership, a plan was put into place where we were going to start utilizing our case management team a little bit more on the treatment or the oversight of shoulder injuries, so that if you know somebody had a shoulder injury we put a case manager on it right away. And at the same time, we're using some ergonomic analysis because we were able to pinpoint specific locations where these shoulder injuries were happening. Our ergonomic team went in and gave an assessment and some improvements on how they could help reduce injuries. The best way to reduce costs is for those injuries not to happen at all.

And then the third part was really from the case manager's standpoint. They developed additional shoulder protocols for surgery cases. That involved educating the injured workers before the surgery even happened, about what was going to happen with the surgery, and the recovery afterwards. Making sure that they were compliant with their physical therapy and their home exercise programs. The end result was substantial. Again, as we started looking at these partnerships for the next year and the year after that, we saw the frequency of shoulder injuries declining thanks to a lot of the ergonomic and educational components. And then when those shoulder injuries were happening, we saw the cost of those going down.

Sometimes people need surgeries on shoulders -- that's not taken away -- but shortening that length of recovery afterwards and getting a successful return back to work, it was so, so important. It was really exciting, one of my favorite ones to share.

**RM:** Well, it's really impressive how sometimes just a minor tweak in a program, or a minor change in how we're approaching these claims or even, again to your point, before they happen, can have such a tremendous impact on the outcomes.

**JH:** They really, really can. I do want to talk a little bit about what's next. What kind of emerging technologies do you foresee as being game changers for creating even greater efficiencies and reducing the chaos in claims management?

**RM:** It seems like we just can't talk about it enough. But as AI continues to evolve, it's going to completely transform the way claims are managed. It's already transforming our personal lives, right? We're starting to use AI more and more. Same thing in our professional lives, in our industry, in every industry, is going to evolve

because of AI. I like to think about a few years ago, Lemonade, made a splash with their three-second claim. And it was with a pretty simple property claim scenario.

As we talk about these more complex scenarios in the casualty space, in auto and workers' compensation, I can foresee a world where most parts of the claims management process can become much more automated and less manual.

And that three second becomes a reality for us, as we're able to automate things that when I began my career we never could have dreamt of automating these pieces, but the evolution of artificial intelligence is going to get us there. It's definitely what was once sci-fi is a reality. And it's a pretty exciting place to be.

**JH:** It is exciting and again I can't stress enough about the need to adopt and interact with this. I am going to say next time we talk I'm going to start tallying how many times we say AI. But I don't think you can have these conversations without bringing that up.

**RM:** You really can't. Data and AI go hand-in-hand and AI is going to be such a critical part of conquering claims chaos. Well, Jim, as always, this was such a great conversation. Thanks again for joining me and sharing your insights.

**JH:** Absolutely. Always a pleasure, Rebecca. As I said these are exciting times for us and for the industry. And I think it's really great to be talking about where things are headed.

**RM:** Definitely. We covered a lot. From how organizations can better leverage data analytics to modernize their claims processes to the real value of turning information into action.

**JH:** And hopefully our listeners are walking away with a few practical ideas on how to start, or continue, and really enhance making data work harder for you.

**RM:** That's definitely the goal. And for those tuning in, thanks so much for spending time with us. Don't forget to subscribe so you don't miss future episodes. We've got more conversations like this one coming your way.

**JH:** And if you did find this episode helpful, feel free to share it with a colleague or drop us a note. We'd love to get your feedback and thoughts. We love to hear what's working with you, and what's working in your world.

**RM:** Until next time, take care and thanks for listening.


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