

A CASE STUDY

LOSS RUN AUTOMATION USING DOCUMENT INTELLIGENCE FOR US-BASED UNDERWRITING FIRM

EXECUTIVE SUMMARY

A U.S.-based underwriting services provider for Workers' Compensation, engaged Trellissoft to address inefficiencies in loss run report handling.

Trellissoft implemented a Document Intelligence solution — powered by DocuVera360 capabilities — to automate extraction, normalization, and query-based retrieval of loss run data. The solution enabled faster, more accurate underwriting decisions while significantly reducing manual effort and operational cost.

CLIENT OVERVIEW

The client is a U.S.-focused underwriting services provider specializing in Workers' Compensation for the SMB segment. The company supports insurance carriers, brokerages, MGAs, PEOs and other intermediaries across the United States.



BUSINESS CHALLENGES

The client's underwriting workflows were constrained by the manual nature and complexity of loss run report analysis

- No standard format across carriers — large variability in tables, terms, symbols, and structure
- High processing time and human dependency for reading, interpreting, and transcribing loss data
- Slow underwriting turnaround and delayed pricing decisions due to data unavailability
- Inconsistent interpretation of key loss metrics across underwriters
- High operational cost and compliance exposure from manual handling

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Why Trellissoft?

The client selected Trellissoft for our proven expertise in AI-powered Document Intelligence solutions for regulated industries and its ability to deliver secure, production-grade automation with integration to downstream underwriting systems.

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SOLUTION

Trellissoft's Document Intelligence Platform (Powered by Docuvera360 Capabilities)

01. INTELLIGENT LOSS RUN DATA EXTRACTION

- Auto-detects variations in layout and template
- Extracts claims, dates, amounts, reserves, narrative text
- Normalizes output into a structured repository
- Generates Excel outputs and API-returned results

02. QUESTION-ANSWERING LAYER FOR UNDERWRITING

- Accepts underwriting questions (e.g., "Total incurred by year?")
- Returns precise structured answers in real time
- Reduces dependency on manual reading and interpretation

03. SECURE INTEGRATION AND DEPLOYMENT

- API-based upload and query endpoints
- Encryption, RBAC, audit logging and controls for compliance



RESULTS AND MEASURED IMPACT

01

PROCESSING EFFICIENCY

- Up to 70% faster loss run processing turnaround
- 50–60% reduction in manual effort and review cycles
- 30–40% drop in rework due to standardized outputs

UNDERWRITING DECISION IMPROVEMENT

- 40–50% faster underwriting decision cycles
- Higher pricing confidence via normalized, comparable loss data
- Reduced subjective interpretation and analyst variance

02

03

OPERATIONAL & COMPLIANCE OUTCOMES

- Centralized, auditable loss run repository
- Lower operational risk and compliance exposure
- Scalable without linear staffing increase

CONCLUSION

By implementing Trellissoft's Document Intelligence platform (powered by DocuVera360 capabilities), the client was able to transform a high-friction bottleneck into a fast, accurate, and scalable workflow. The solution accelerated underwriting, enhanced pricing confidence, reduced cost of operations, and created a reusable intelligent data layer over unstructured loss runs — establishing a foundation for broader automation across the underwriting lifecycle.



DocuVera360 transforms enterprise document processing with intelligent AI automation.



Headquartered in San Jose, CA, Trellissoft AI specializes in transforming businesses with innovative AI-Powered solutions & Services.



info@trellissoft.ai ✉

www.trellissoft.ai 🌐

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