

How AI is powering smarter governance for the Salvation Army General Insurance Company



Background

The Salvation Army General Insurance Company (Sagic), a subsidiary of The Salvation Army UK, has a long history of providing insurance services to its parent organization and other families, businesses and non-profits.

Arran Gray, the Chief Operating Officer, spearheaded the company's governance transformation five years ago by leading its transition from manual board management processes to Diligent Boards.

Now, as early adopters and champions of Diligent GovernAI, they're extending the value of Boards with industry-leading AI functionality.

“ We're seeing a real difference in how quickly and confidently we prepare for meetings, and the tailored insights have made our discussions much more meaningful. Having only begun to start using GovernAI, we're excited about making our governance work more efficient for everyone involved.”

Arran Gray, COO

Challenges

Before, board meeting materials were based on information derived from email attachments, which led to a time - consuming and manual process of assembling materials via decks and other documents. As the company grew, the governance challenges began to grow with it — leading to a growing need for a smarter, more efficient governance process powered by AI:

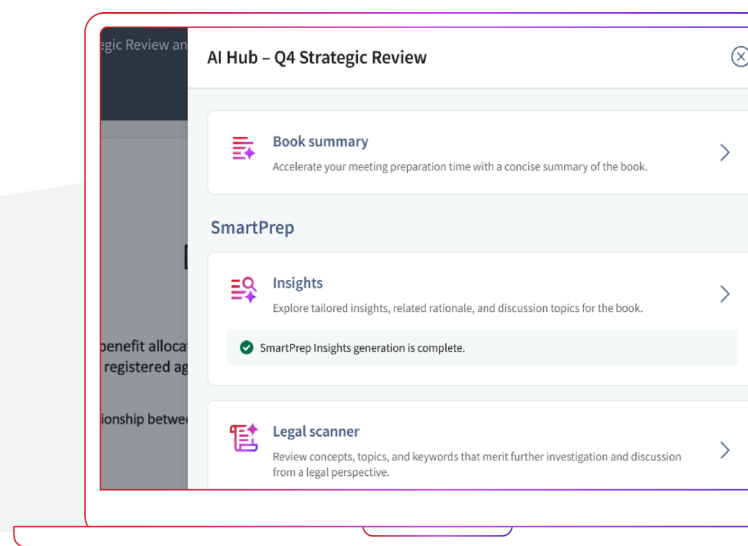
- **Expanding board packs:** Board packs grew from 20 to 30 pages to over 100 pages, making the process of managing and distributing documents cumbersome and inefficient. The volume of information in the packs often overwhelmed board members, making it difficult for them to prepare and stay informed about key points.
- **Manual methods:** The company relied on manual processes like sending emails with numerous attachments. With little flow to the attachments sent, the board's ability to review the documents in the appropriate context was limited. This added to the administrative burden, and the heightened security risk greatly increased the chance of important details being overlooked.
- **No single source of truth:** With so much content coming in through different senders and sources, the governance administration team needed a more efficient way to gather and present information, so all board members had access to the same range of data.

Solutions

To address these challenges, Arran's team turned to Diligent Boards and its purpose - built suite of artificial intelligence capabilities, GovernAI. Arran was initially skeptical about using AI, as he was unclear on how much value it could bring to his team. Over time, his view shifted as he spoke with Diligent and saw that it could add more than he originally expected. Once implemented, the benefits started to stack up:

- **AI-generated summaries:** Instead of reading through 100+ page board packs, directors now receive meaningful summaries with **AI Smart Book Summary**. This helps them prepare them for board meetings with an overview of areas in the business that might not be under their jurisdiction.

“ The summary document feature is a significant benefit. It provides key insights and helps directors digest information more effectively, leading to more informed and productive discussions.”



- **AI-generated insights:** Pointed questions are prepared for every meeting, serving as a compass for directors to rely on. With **AI Smart Prep Insights**, Arran's directors are coming into meetings more prepared and with questions ready to guide the decision-making process.

“ Pulling out key bits of information [with GovernAI] has been excellent.”

- **Centralized portal:** With one place to go for documents, meetings and communication, distribution of materials became simpler and more secure. Directors are now able to look back on previous meetings in a much more streamlined fashion and refer to documents as they are referenced.
- **Integration with other tools:** Diligent Boards integrates seamlessly with systems like DocuSign and Google Drive, ensuring actions that happen in one system happen in the other.

Business value

The implementation of Diligent Boards and its suite of GovernAI capabilities has significantly enhanced the governance and operational efficiency of Sagic. Directors, executives and the governance team can now easily review documents, notes and meeting minutes in a fraction of the time, with AI summaries and key insights surfaced to them with the click of a button. As a result of this:

- Directors are more engaged and better prepared, asking deeper questions in meetings.
- AI-powered summaries help support detail-oriented reviews (vs. high-level overviews) on topics across legal, financial data and more. The board operates with an AI-first mindset, helping set the scene for future efficiencies and new adoption of AI workflows.
- Admin burden has been significantly reduced with an all-in-one home for documentation and materials.
- Integrations across the tools they use help streamline the process of keeping information updated across their technology stack.



Conclusion:

Sagic's successful adoption of Diligent Boards and GovernAI has clearly demonstrated the value of AI-powered governance software in driving efficiency and engagement at the board level. The governance process at the company has been streamlined and improved through smarter workflows, time savings and enhanced decision-making all playing a part.

Looking ahead, Sagic is only beginning to unlock the full potential of [Diligent's AI-powered suite](#). With **AI Smart Prep Insights** and **AI Smart Book Summary** already in use, the team is excited to adopt more of Diligent's AI functionality. With **AI Smart Minutes**, the board will be able to generate high-quality first drafts of meeting minutes from transcripts. And by using **AI Smart Book Builder**, board books can be created from existing materials.

Today, the company is well-positioned to further streamline governance operations, reduce manual effort and empower board members with smarter, more actionable insights.

As adoption continues, Sagic's journey stands as a forward-thinking example of how AI-driven innovation can transform board governance from the inside out.

“ The AI enhancements...will take that further. It's more automation and more insights - what can be drawn out of the information instead of just managing it.”



About Diligent

Diligent is the AI leader in governance, risk and compliance (GRC) SaaS solutions, helping more than 1 million users and 700,000 board members to clarify risk and elevate governance. The Diligent One Platform gives practitioners, the C-Suite and the board a consolidated view of their entire GRC practice so they can more effectively manage risk, build greater resilience and make better decisions, faster.

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