



INSURANCE & FINANCIAL SERVICES

Faster Claims. Compliant Operations. Delighted Clients.

AI-powered document and workflow automation connects client, policy, and claims information to deliver speed, accuracy, and compliance - natively inside Microsoft 365.

THE OPERATIONAL REALITY

- Client files scattered across policy systems, email & drives
- Manual underwriting, submission-to-bind, claims, and endorsement workflows driving inconsistency, delay, and operational risk
- Regulatory pressure - Solvency II, FCA, IAIS
- Broker, carrier, and reinsurer collaboration across submissions, binders, endorsements, and treaty documentation managed through email

THE CHALLENGE

Operational Friction in Insurance Firms

Insurance brokers and carriers rely on client documents, policy files, claims records, and compliance evidence to deliver accurate, timely, and defensible service. But when that information is fragmented across systems and difficult to trust, claims slow down, regulatory risk increases, and client service suffers.



Information Chaos

Client files live across policy systems, SharePoint, email, and legacy ECM. Staff waste hours switching systems to build a complete client or claims picture.



Manual Workflows

Underwriting submissions, quote-to-bind workflows, claims handling, endorsements, renewals, and delegated authority approvals move through email and spreadsheets - creating inconsistency, delays, and SLA risk.



Compliance Exposure

Solvency II, FCA and PRA operational resilience expectations, and client confidentiality demand airtight document control that most firms struggle to demonstrate under audit.



Talent & Retention

Manual admin burden in claims and compliance teams drives turnover and compounds capacity risk in peak periods and regulatory cycles.

THE SOLUTION

From Operational Friction to Connected, Audit-Ready Insurance Operations

M-Files for Manufacturing Quality Management eliminates operational friction by connecting quality documents, workflows, and compliance evidence to the products and processes they govern so every team works from a single, trusted source of truth.



Eliminate Information Chaos

M-Files connects client files across policy systems, SharePoint, and email using metadata so information is always organized by client, risk, or claim - not by folder.



Automate Insurance Workflows

M-Files automates underwriting submissions, quote-to-bind workflows, claims management, endorsements, renewals, treaty documentation, and delegated authority approvals with full visibility, traceability, and SLA enforcement.



Strengthen Compliance

M-Files enforces governance with built-in audit trails, permissions, and version control. All compliance evidence is connected and traceable - continuously audit-ready.



Improve Talent Retention

M-Files eliminates repetitive admin through automation and structured workflows. Teams work in familiar Microsoft 365 tools, reducing burnout and improving retention.

M-Files is Built for Modern Insurance Operations

M-Files delivers Context-First Document Management, connecting client, policy, and claims documents into a unified system that reduces operational friction and gives insurers a performance advantage. Native to Microsoft 365, M-Files allows teams to work directly in Outlook, Teams, and SharePoint while governance, automation, and compliance happen seamlessly in the background.

- ✓ **Stop searching. One view of every client file, every system**
- ✓ **Automate underwriting submissions, quote-to-bind workflows, claims handling, endorsements, and renewals**
- ✓ **Automated audit trails - always ready, zero scramble**
- ✓ **Hubshare client portal - branded, secure, 24/7**
- ✓ **Lives in Outlook. No migration. Quick time to value**
- ✓ **Solvency II · FCA · IAIS · M365 Copilot · Copilot Agents**

PROOF

301%

Return on Investment

Forrester TEI, 2026

30%

Faster Internal Compliance Audits

Forrester TEI, 2026

92%

Faster Policy Cancellation

Austbrokers Countrywide

94%

Would Recommend

Gartner Peer Insights

“

By using M-Files to incorporate these automated workflows into its operations, Austbrokers Countrywide has been able to make significant inroads towards achieving its goals of growing the business without adding staff members and focusing on high-value client interactions.

Dilip Rao

Manager - Austbrokers Countrywide

M-Files

SEE M-FILES IN ACTION

Request a personalized demo.

REQUEST A DEMO

