

SOLUTION BRIEF

AI that shows its work.

Finance, operations, and records teams spend thousands of hours checking documents against the numbers they are supposed to support. We build agents that do that work continuously and prove it was done right. Each result shows its sources, its calculation, and its confidence score; anything below the floor goes to a person. Built inside your environment. Working in four to six weeks.

What the agent does

01	02	03	04
Ingest	Reconcile	Verify	Communicate
Uploads and normalizes disparate document types and data sources.	Compares values across sources and completes calculations as needed.	Discovers errors, prevents them, and scores its own confidence.	Reports status and results to every participant in the chain.

Where it applies

Premium & claims audit	Teams spend 200+ hours a quarter tying premiums and claims to contracts. The agent reads everything as it arrives; people decide the exceptions.
Bordereaux ingestion & reconciliation	Brokers and MGAs send statements in every shape a spreadsheet allows. The agent normalizes and reconciles them in hours and flags the rows that need judgment.
Commission reconciliation	Manual commission work leaks 3-8% in specialty insurance. The agent recalculates every statement against the producer agreement.
Claims intake & reserving	First notice of loss arrives as documents. The agent builds the claim record, routes triage, and drafts reserves with confidence scores. Adjusters decide.
Certified record assembly	Assembles a longitudinal record from fragmented sources, lets the owner review and certify it, and answers questions over the documents. In delivery for DHMS.

DELIVERED — PREMIUM & CLAIMS AUDIT		SPECIALTY INSURANCE GROUP
Quarterly audit time		-75% ✓
Team productivity		2x ✓
Automated accuracy		99% → ~100% with review ✓
Audit cadence		Quarterly → always-on ✓
✓ MEASURED ON A DELIVERED STRATAEDGE ENGAGEMENT		

How the system shows its work

Confidence floor	Defined before go-live; anything below it goes to a person
Human review	Routed on exceptions, with the evidence attached
Decision trace	Every answer records its documents, its arithmetic, its confidence, and who checked it
Fallback path	Rules plus a manual queue when the model should not decide
Operating owner	Named in the handoff, with runbooks

Four to six weeks to a working system

01	Discovery	Document the workflow with your experts and define success measures.
02	Architecture and build	Design the system, data contracts, controls, agent, and review UI.
03	Test and validate	Run historical work through the system and tune the exception path.
04	Production decision	Review measured outcomes, governance, ownership, and scale.

Then production: the full system, operations training, named owners, and runbooks. It runs without us.

The posture your auditors will ask about

Built in your environment Runs inside your cloud account. Documents and financial data never leave your perimeter.	Compliance fluency SOX-ready audit trails, HIPAA mapping, DoD overlay experience, full lineage, infrastructure as code.
Controls as architecture Confidence floors, human review, decision traces, and fallback paths, built in from the start.	Cost discipline We budget model calls the way we budget anything else, and size the system to the work.

Who you would work with

Linda Apsley, CEO	CTO, GEICO • Head Architect, Citi • Amazon, Microsoft, Capital One
Allan Carroll, CTO	CTO, LoanFlow • CTO, FamilyLink • SingleStore, Microsoft Research

Bring the workflow, the constraint, and the business case.

It is a 30-minute working call with a managing partner, no deck.
StrataEdge AI, a registered DBA of Apsley Consulting Group, LLC • SAM UEI HC16MHZTAM18 • CAGE 10N31

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