

Digital Transformation in the Age of Compliance & Governance

*From Automation to Agentic Workflows for
Insurance Organizations*

RISKTECH WEBINAR SERIES

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- Patrick O'Neill, Moderator
- Darrel Vaughn, CMO, Klear.ai
- Ritza Vaughn, EVP, Klear.ai
- Anirudh (Jay) Chandnani, Data Scientist, Klear.ai
- Bobby Hunter, CPO, Klear.ai

AGENDA

- Introduction
- The Shift: From Automation to Agentic
- The Speed of Change & Why It Matters
- Implementation Reality
- Governance & Human-in-the-Loop
- Roadmaps & Avoiding the Traps
- Partnership: No One-Size

The Shift: From Automation to Agentic

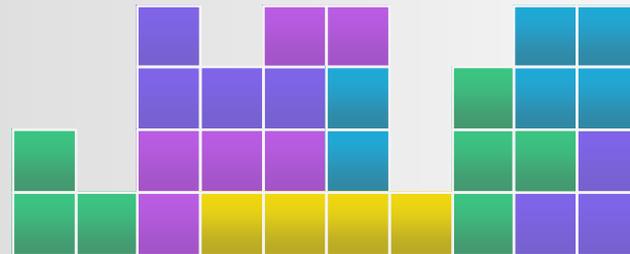
- Automation helped; decisions stayed manual
- Agentic AI drives decisions (guardrailed)
- Observe → Plan → Act → Repeat
- Operating-model change, not a tool swap

The **Speed** of Change & Why It Matters

- Yesterday's "leading" is today's baseline
- Urgency is high; starting points are unclear
- Capabilities are accelerating (review, triage, summarization)
- Waiting adds risk; moving early builds edge

Implementation Reality

- **Surprises!** aren't technical – they're organizational
- **Data exists;** context needs to be defined
- **AI forces** workflow redesign / rethinking
- **Adoption =** trust + visible role shifts



Governance & Human-in- the-Loop

- **AI strengthens** compliance when controls are built into the workflow
- Governance shifts from review to prevention
- Decisions become structured, visible, and consistent
- Humans shift from checking work to **managing risk**

Roadmaps & Avoiding the Traps

- **Trap:** point fixes that can't evolve
- **Ask:** will this platform scale with change?
- Native AI beats bolt-ons (less rip/replace)
- **Roadmap stays live:** revisit often with a trajectory partner

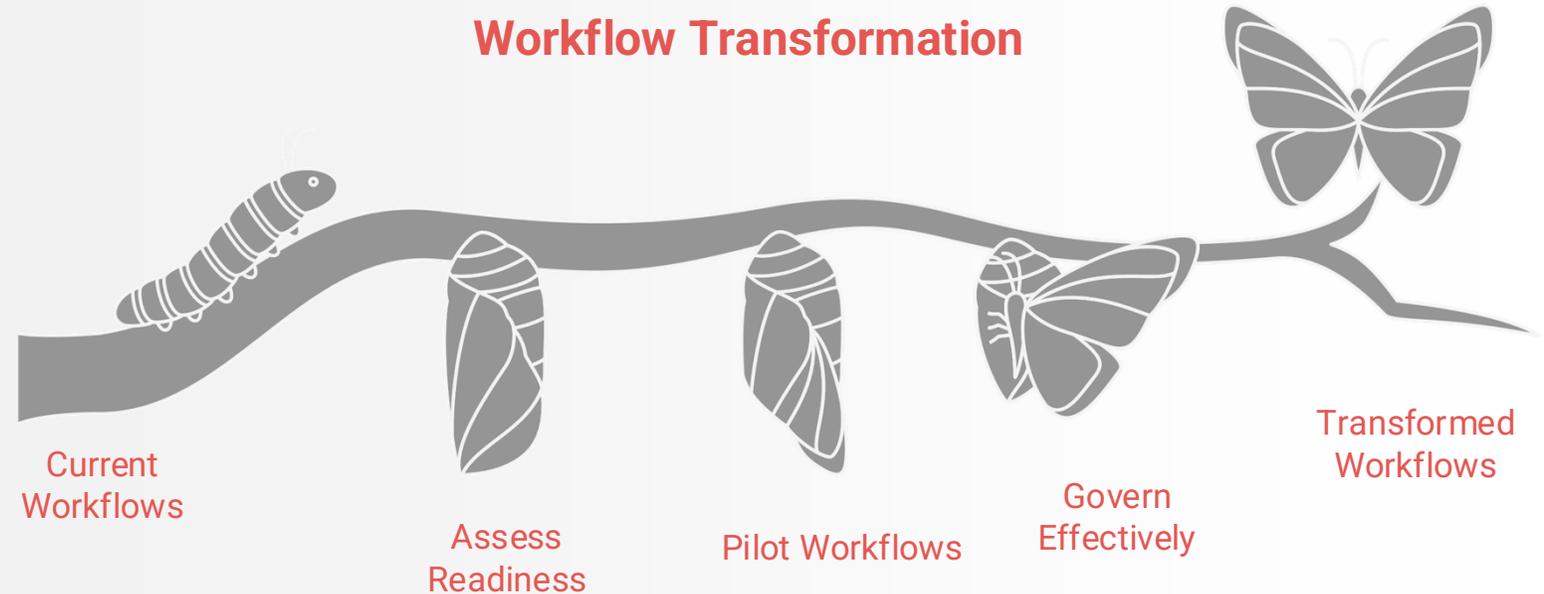
Partnership: No One-Size- Fits-All

- **Every path differs:** risk, regs, culture, starting point
- People/process change is the hard part
- Hands-on through data, workflows, governance, change
- Don't just pick the platform - Pick your PARTNER

Takeaways: move fast, stay governed

Next steps: assess readiness, pilot 1-2 workflows

Closing & Q&A



THANK YOU!

Darrel Vaughn

Chief Marketing Officer | Klear.ai

darrel.vaughn@klearai.com

925-640-7156

[linkedin.com/in/connectwithdarrel](https://www.linkedin.com/in/connectwithdarrel)

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