AutoRek

Can Insurance Operations Keep up with Strategy?

Most insurance challenges don't originate from poor strategy, they arise where financial data moves between systems, teams, and third parties.

Without strong reconciliation and control, transformation initiatives, AI investments, and growth strategies struggle to deliver value.

AutoRek surveyed 250 multi-level insurance managers across the UK & US. We found that:

- **14%** of operational budgets are spent correcting manual errors
- **22%** cite increased operational costs as the top consequence of reconciliation complexity
- **20%** report compliance and audit risks from operational inefficiencies

Back-Office modernization now leads strategy as **42%** of respondents are focusing on automation of Back/Middle-Office functions

What Insurance CFOs & Finance Teams Face:

- Revenue leakage and write-offs hidden in complexity
- Slow financial close and limited real time visibility
- High cost of control and audit fatigue
- Risk exposure across delegated authority, claims, and commissions
- Burnout in finance and operations teams

Why Insurance Leaders Are Re-thinking Financial Operations

Modern Challenges

Insurance organizations today face unprecedented pressure: tighter margins, growing regulatory scrutiny, increasing data volumes, and rising operational complexity. Yet many finance teams are still dependent on manual reconciliations, spreadsheets, and fragmented controls.

AutoRek: Purpose-Built for Insurance Complexity

AutoRek is an enterprise reconciliation and control platform designed specifically for complex, regulated industries like insurance. It automates, evidences, and governs reconciliation across the full insurance value chain. AutoRek is trusted by global Insurance Carriers, MGAs, brokers, agents and the healthcare industry.

Providing unmatched expertise in claims, bordereaux, IBA, credit control and premium allocation, AutoRek:

- Ingests data from any source, any format to **drive smoother, faster processing**
- Has built-in exception management and full audit trail for **stronger compliance and oversight**
- Includes no-code / low-code setup that **reduces manual effort and IT dependency**
- Provides scalable architecture supporting millions of transactions and multiple **jurisdictions for future-proof growth**



AutoRek

How AutoRek helps

Premium & Credit Control

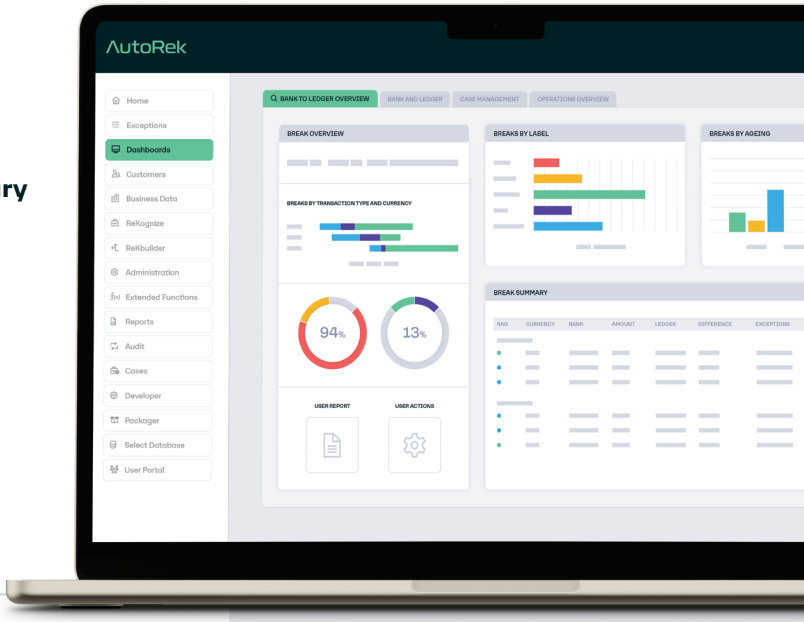
Commission & Intermediary Reconciliation

Claims & Loss Funds

Bank, Ledger & Treasury Reconciliation

Delegated Authority & Bordereaux

Regulatory & Financial Reporting



Insurance Use Cases

- Insurance Broker Accounting (IBA) automation
- Bordereaux reconciliations and management
- Intersystem reconciliations
- Sub-ledger reconciliations
- Cash posting and allocation
- Credit control
- Cashflow matching
- CASS 5 automation
- Balance sheet attestation
- Insurer statement reconciliations
- Data validation and integrity reconciliations

Proven Impact in Insurance

- ✓ Up to 80% match rates achieved
- ✓ Faster close cycles and reduced manual effort
- ✓ Improved audit outcomes and regulatory confidence
- ✓ Greater visibility across finance, operations, and risk



When accuracy counts. Be sure.

Get ready to transform your reconciliation process

autorek.com/demo