



Where the  
*MAGIC*  
happens

2024 **KONnect**

# What's New & What's Next Insurable Risk

PATRICK ESLICK

VP Product Management, Riskonnect, Inc.

# Forward Looking Statement

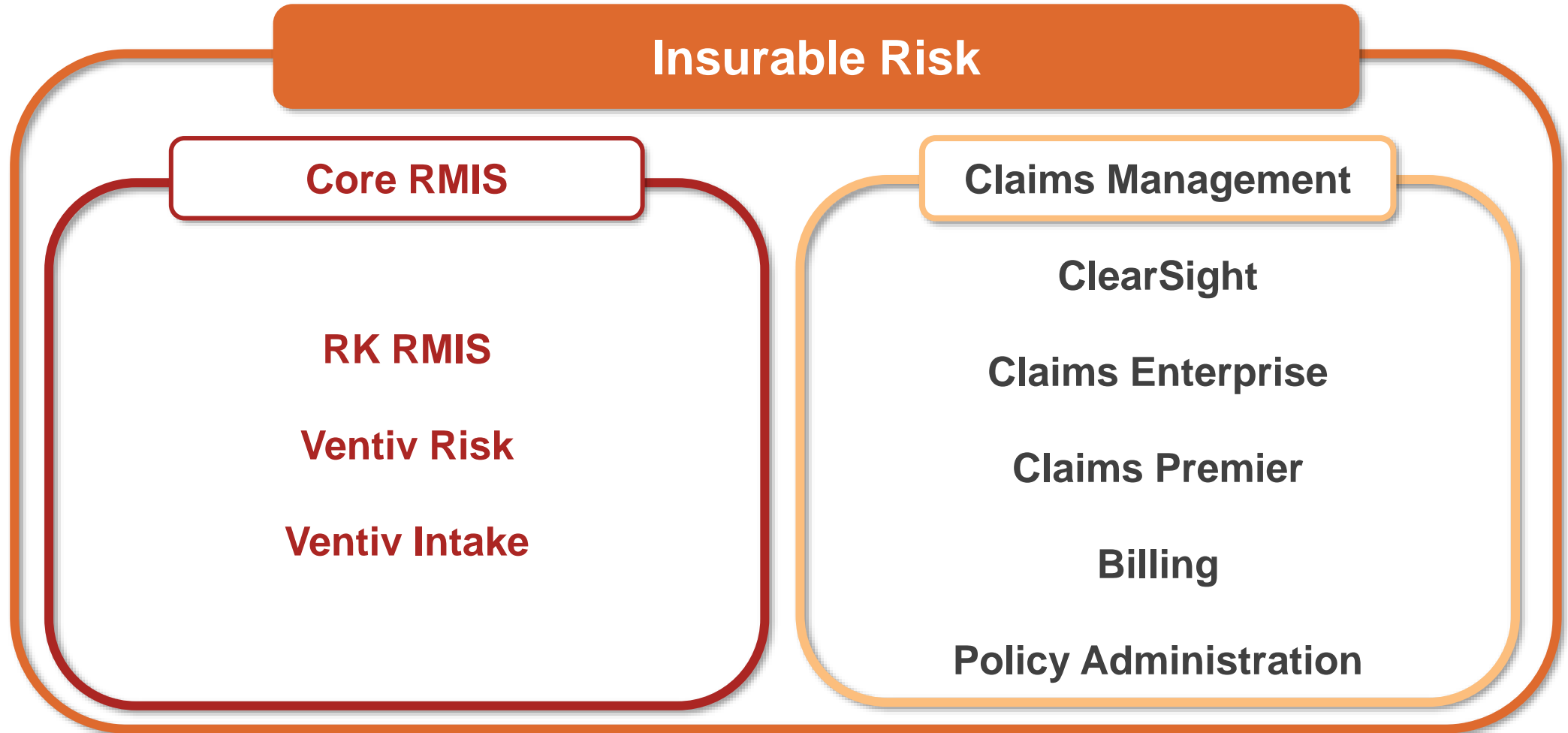


The specifications, functionality and schedules described in our presentation reflect Riskonnect's current estimates only. There may be changes to the same without notice. These materials are for informational purposes only and do not constitute an obligation or commitment on the part of Riskonnect. In addition, in connection with your consideration of Riskonnect, its products and services, you may have received from Riskonnect or its affiliates certain financial information containing, among other things, projections and other forecasts, including, without limitation, projected financial statements, cash flow items, cost estimates, certain business plan information and other data related to Riskonnect. You acknowledge that (a) any such documents are not and shall not be deemed to include representations or warranties of Riskonnect and are for informational purposes only, (b) there are uncertainties inherent in attempting to make such projections, forecasts and plans and, accordingly, is not relying on them, (c) you are familiar with such uncertainties and is taking full responsibility for making its own evaluation of the adequacy and accuracy of all projections, forecasts and plans so furnished to it and (d) you shall have no claim against anyone with respect to any of the foregoing.

All information provided to you in connection with your consideration of Riskonnect, its products and services, is Riskonnect's confidential and proprietary information, all rights in and to which are expressly reserved by Riskonnect.

Riskonnect Confidential Information. All rights reserved. © 2024 Riskonnect, Inc.

# You Are In the Right Place!!!



# What's

# NEW

- Key Enhancements and Improvements:
  1. Multi-Event Intake Digital Experience for RK RMIS



## What's New

# Multi-Event Intake for Digital Experiences



**OOTB Starting Point for Intake on the RK RMIS Platform Utilizing Modern UX Designs**

Innovation

Integration

Deliver Value

View of Risk

# What's

# NEW



- Key Enhancements and Improvements:
  1. Multi-Event Intake Digital Experience for RK RMIS
  2. OCR for COIs
  3. Ability to Link a Claim to Multiple Policies in ClearSight
  4. UI Updates: ClearSight, Claims Enterprise and Billing
  5. Billing KPI Indicators

## What's New

# UI Enhancements for ClearSight



The screenshot displays the ClearSight dashboard interface. On the left is a navigation menu with categories like 'Home', 'Claims and Incidents', 'Occurrences', 'Parent Occurrences', 'Tasks', 'Payment Processing', 'Text Messages', 'Reports', 'Data Discovery', 'Manage State Forms', 'Report of Injury', 'Invoices', and 'Chargeback Allocations'. The main content area shows 'My Tasks' with a count of 930, 'My Claims' with 385, and 'Approvals' with 17. Below this is a calendar view for September. A login modal is overlaid on the dashboard, featuring the text 'Welcome to ClearSight' and input fields for 'Client ID', 'User ID', and 'Password'. A 'Log In' button is present, along with a 'Forgot your password?' link and a warning message: 'Warning: The use of this system is restricted. Only authorized users may access this system'. At the bottom of the modal are links for 'Riskconnect.com', 'Contact Us', 'Cookie Policy', and 'System Configuration'.

**Initial UI/UX  
Changes for the  
ClearSight  
Modernization  
Project**

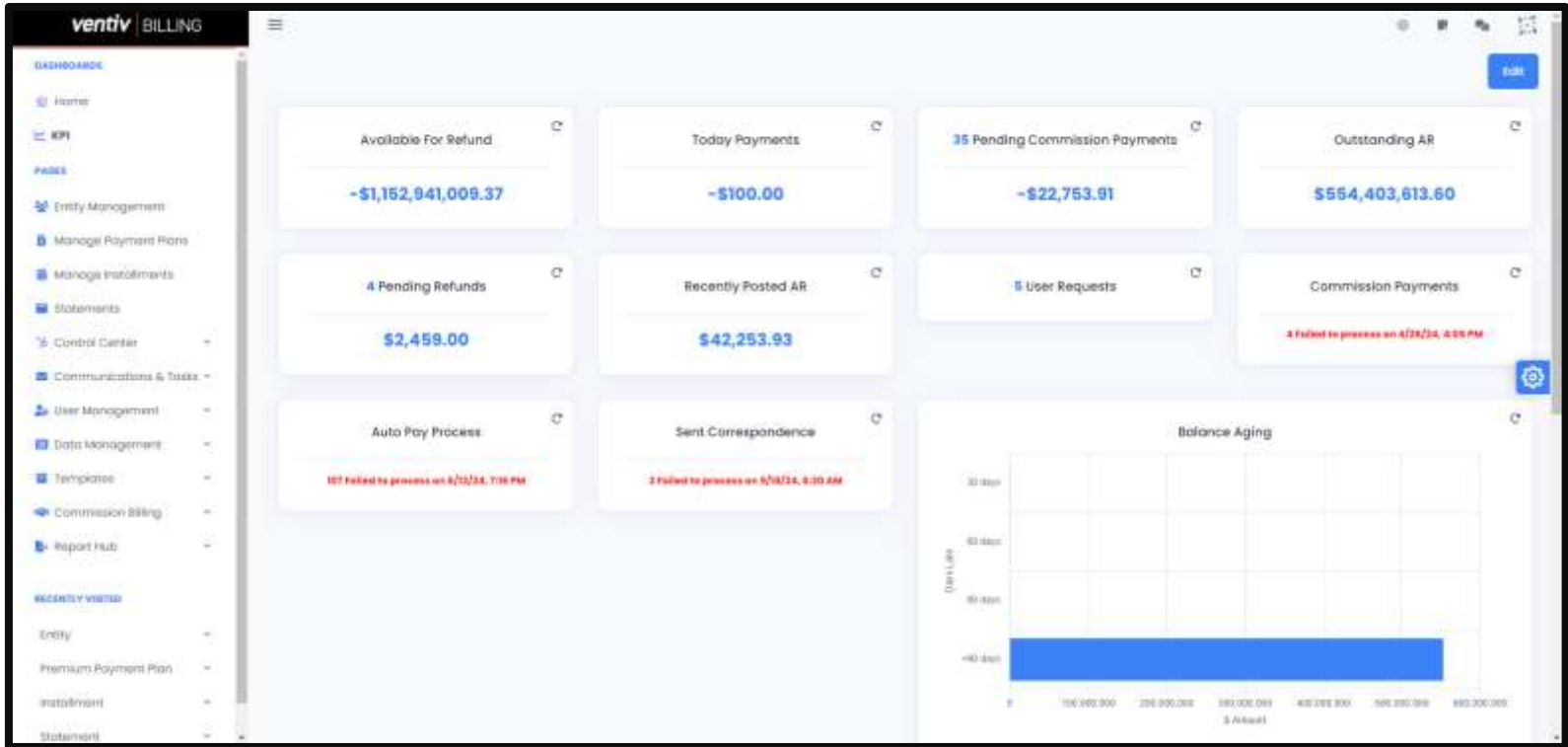
Innovation

Integration

Deliver Value

View of Risk

# What's New Billing New UI and KPIs



OOTB Standard  
KPI Indicators  
with a New,  
Modern UX / UI

Innovation

Integration

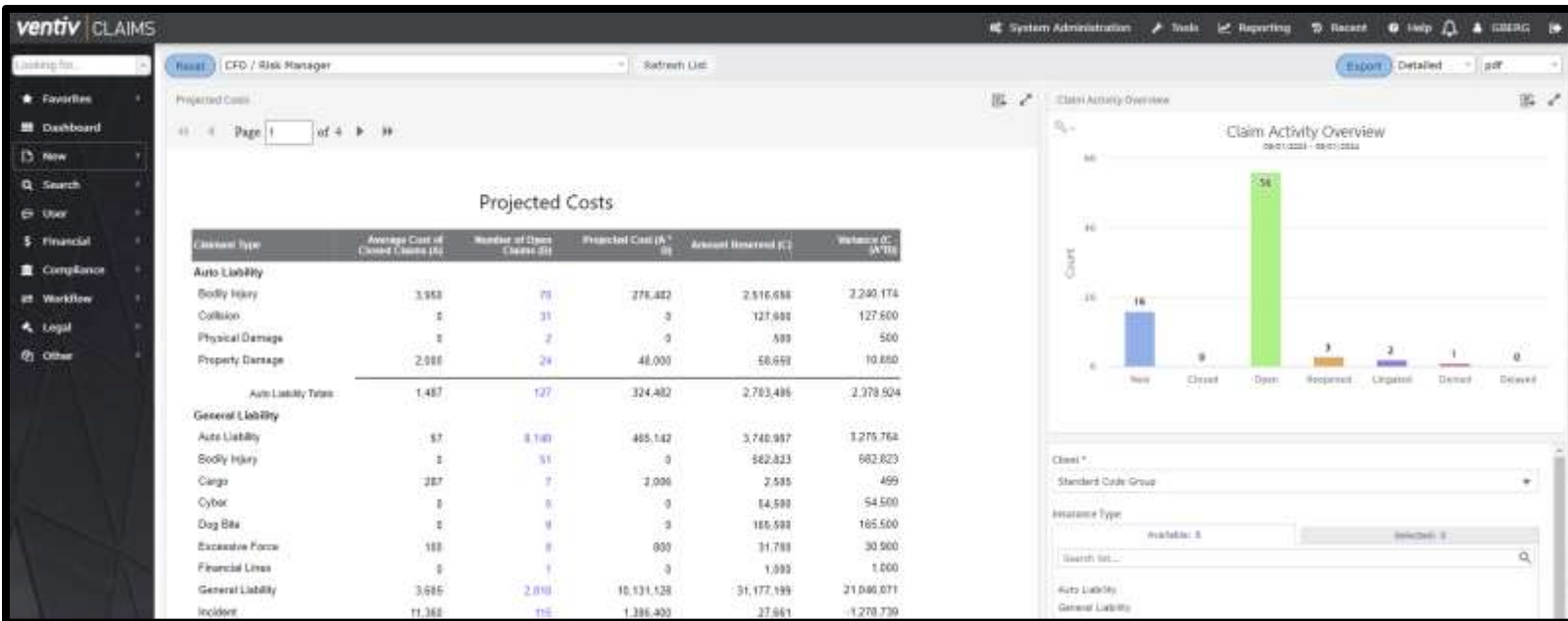
Deliver Value

View of Risk



# What's New

## Updated Claims Enterprise UI



Modernized UI with  
Updated UX  
Workflow  
Enhancements for  
Claims Enterprise

Innovation

Integration

Deliver Value

View of Risk

# What's

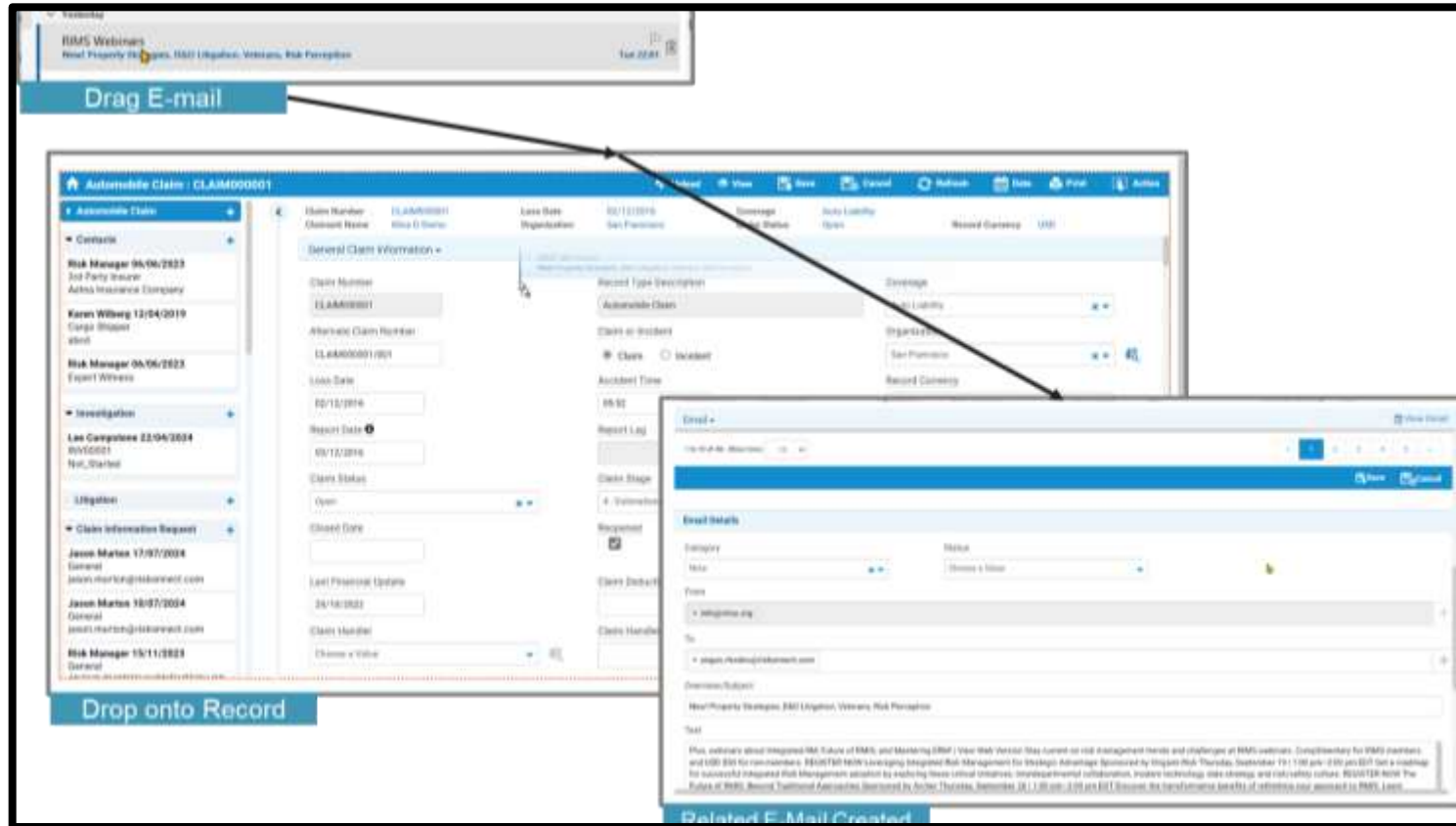
# NEW



- Key Enhancements and Improvements:
  1. Multi-Event Intake Digital Experience for RK RMIS
  2. OCR for COIs
  3. Ability to Link a Claim to Multiple Policies in ClearSight
  4. UI Updates: ClearSight, Claims Enterprise and Billing
  5. Billing KPI Indicators
  6. Enhance Campaign / Renewal Support in Ventiv Intake
  7. Outlook Email Drag & Drop Support for Ventiv Risk

## What's New

# Outlook Email Drag & Drop for Ventiv Risk (VR)



Provides the Ability to Drag an Email From Outlook Onto a Record in VR and Stored

Innovation

Integration

Deliver Value

View of Risk

# What's

# NEW




- Key Enhancements and Improvements:
  1. Multi-Event Intake Digital Experience for RK RMIS
  2. OCR for COIs
  3. Ability to Link a Claim to Multiple Policies in ClearSight
  4. UI Updates: ClearSight, Claims Enterprise and Billing
  5. Billing KPI Indicators
  6. Enhance Campaign / Renewal Support in Ventiv Intake
  7. Outlook Email Drag & Drop Support for Ventiv Risk
- Don't forget to check out the release notes: [Customer Portal](#)

# By the Numbers...




**300+**  
new ideas  
received



**~420**  
new features  
delivered

**80+** % of  
roadmap  
based on  
customer  
ideas




**> 95%**  
product retention

**50** total releases  
across  
8 platforms

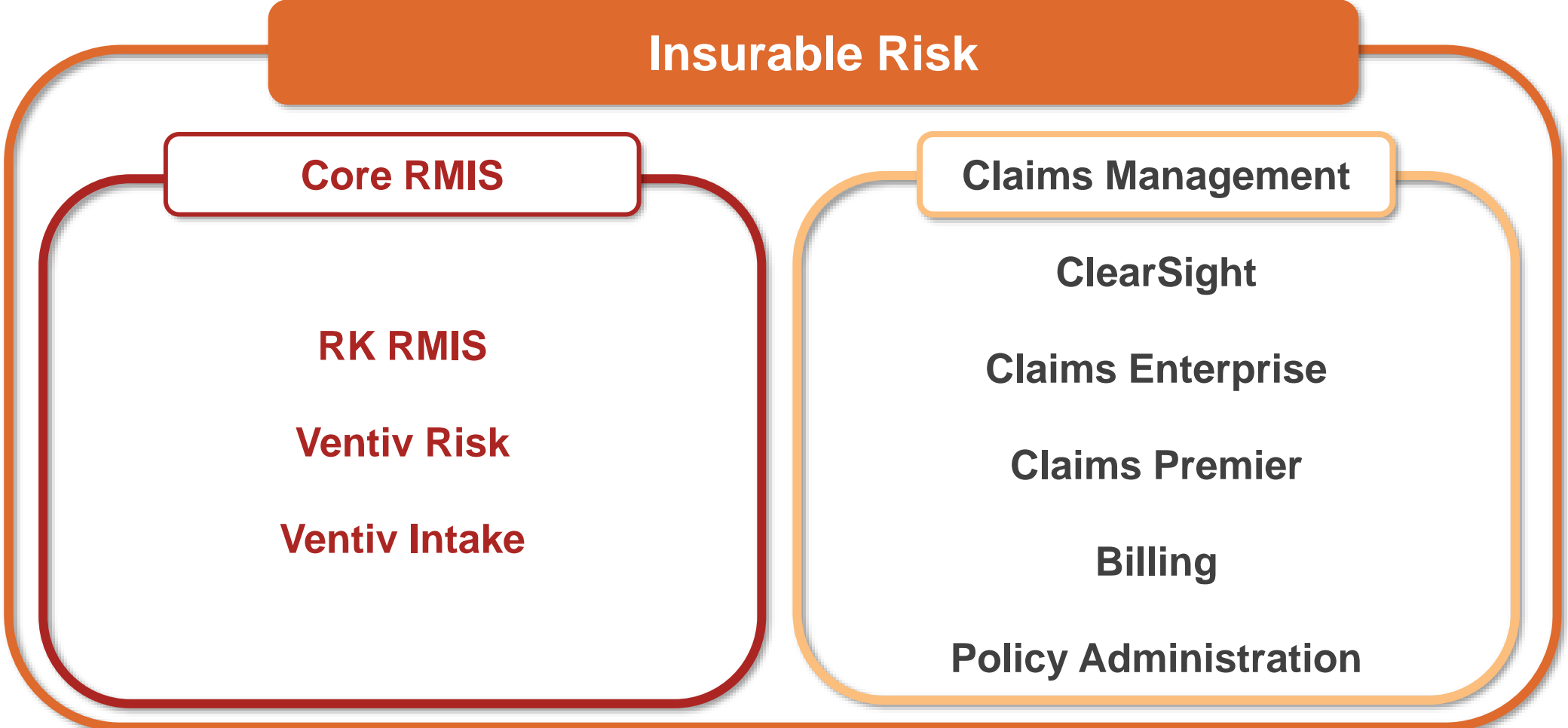


**200**  
average bugs resolved  
per platform

**400** new conversions  
**20+** integrations added



# Two Roadmaps: What's Next



# Insurable Risk RMIS Roadmap



Innovation



Integration



Deliver Value



View of Risk

Near Term – 6 months

Mid Term – 6 to 12 months

Long Term – 12 to 24 months



## Enhance Texting Service

- Support the usage of What's App as an alternative to text messaging through Twilio
- Enhance auto-linking for inbound to link based on defined active cases.



## Accessibility Compatibility with WCAG AA

- Enhance accessibility support and progress towards WCAG AA
- Starting with Force.com and then evaluating for other platforms



## Improved Standard Values Collection Tool

- Support adding new records from exported spreadsheet for RK Renewal Portal
- Commence Value Collection enhancements provide a market leading tool for the RK RMIS product



## Next Generation RPA for Ventiv Risk

- Upgrade to the next generation OCR technology with >90% accuracy with AI and standard support for ACORD 25 forms



## Expanding Intelligent Claims Processing to RMIS Platforms

- Standardize the same initiative seen on the ClearSight claims roadmap on the force.com platform



## Benchmark/Predict for Ventiv Risk

- Standardize benchmark and predict models for easier delivery and real-time predict scoring.



## Investigate Standardized Intake Approach Across Platforms

- As Intake is one of the most critical tools used, need to determine ideal future state for Intake products across platforms.



## Further Standardize Additional EHS Module Evaluations – Phase 1

- There are ancillary, lesser used areas of EHS that we are evaluating adding to the base product setup for the RK Platform.



## Natural Language Querying for Ventiv Risk

- Evaluation of NQL capability with potential extensions into claim summary with suggestions



## Continued TPA / Carrier Standard API Integrations

- As Carriers and TPAs grow and standardize the approach for out of the box API integrations, look to make those fully available to customers.



## Standard IRM Integrations to other Riskconnect Product Lines

- Simplify ability to share data from other product lines for combined workflows and evaluations.



## New Power BI Reporting Option

- Evaluate integration of PowerBI into Ventiv Risk for standardized cross product dashboards and reporting capabilities



## Further Standardize Additional EHS Module Evaluations – Phase 2

- There are ancillary, lesser used areas of EHS that we are evaluating adding to the base product setup for the RK Platform.

# Insurable Risk Claims & Admin Roadmap



## Near Term – 6 months

## Mid Term – 6 to 12 months

## Long Term – 12 to 24 months



### Intelligent Claims Processing (ICP)

- New Initiative to modernize full end to end capabilities of claims processing utilizing AI and updated rules engine capabilities.
- This will be a multi-year initiative across multiple platforms.



### UX Update for ClearSight

- Utilizing the new Angular framework and our internal UX team, will be making UX improvements to the ClearSight platform utilizing modern and best in class practices for software systems.



### Standardized Subrogation Setup and Workflows - Continued

- Create a new setup for managing subrogation with pre-built workflows and setups for better out of the box use.



### Address the Prioritized Backlog of Customer Committed Work

- Rapidly address the backlog of work for Claims Enterprise, Claims Premier, Policy and Billing that has been committed to customers prior to acquisition and since.



### ClearSight Insights Beta Programme

- Power BI Beta programme to obtain customer feedback while SSO issues are resolved



### Additional Phases of ICP and UX Update

- Continued delivery of the two initiatives started in the Near Term.



### Investigate Standardized Intake Approach Across Platforms

- As Intake is one of the most critical tools used across all Insurable Risk solutions, will look to determine ideal future state for Intake.



### Support for TPA Billing

- Enhancement to the Billing platform to allow for TPA Billing management.



### Enhance Texting Service

- Support the usage of What's App as an alternative to text messaging through Twilio



### Accessibility Compatibility with WCAG AA

- Enhance accessibility support and progress towards WCAG AA
- Starting with Force.com and then evaluating for other platforms



### Standard IRM Integrations to other Riskconnect Product Lines

- Simplify ability to share data from other product lines for combined workflows and evaluations.
- Examples: CE or CS to RK RMIS and Billing to ClearSight



### Continued TPA / Carrier Standard API Integrations

- As Carriers and TPAs grow and standardize the approach for out of the box API integrations, look to make those fully available to customers.



### Improvements to the Self-Service Functionality of Admin Platforms

- Evaluating and making improvements to key administrator workflows across ClearSight, Policy and Claims Enterprise to start.

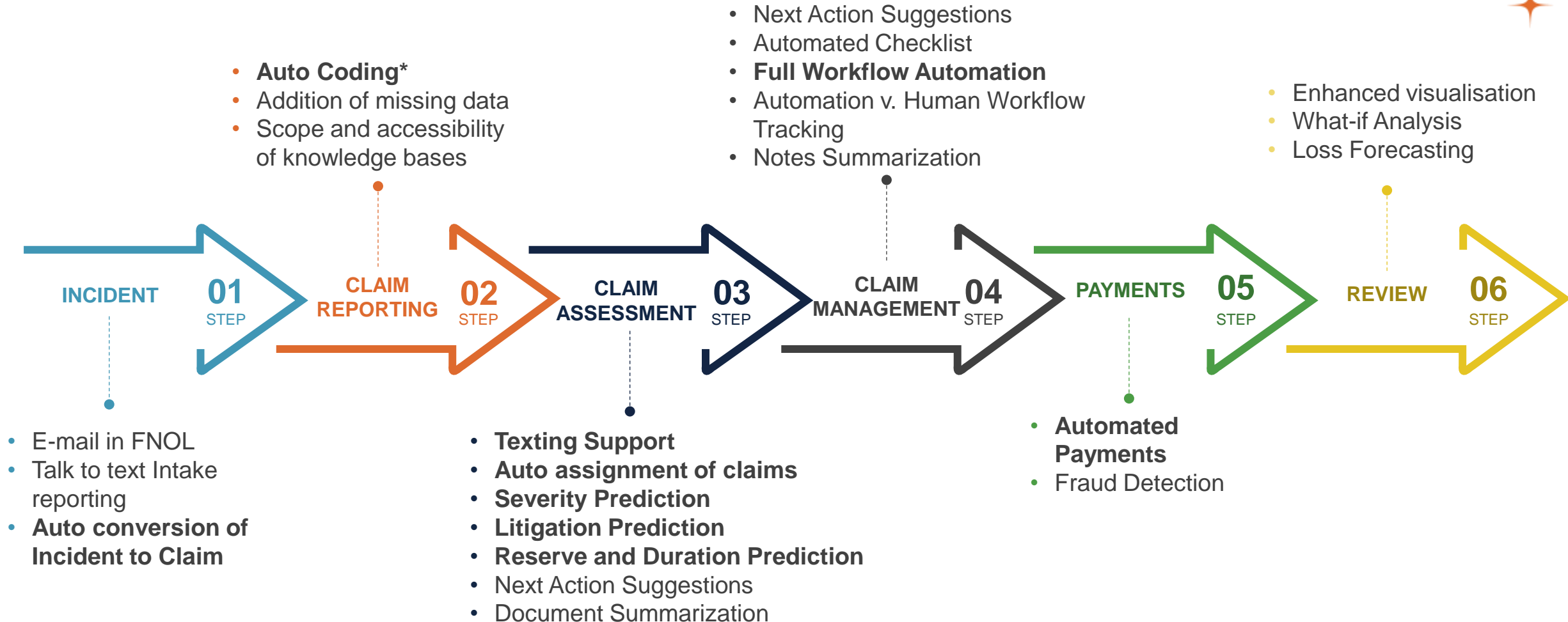


### New Power BI Reporting Option

- Evaluate integration of PowerBI into other Admin platforms for standardized cross product dashboards and reporting capabilities



# What's Next Intelligent Claims Processing



## What's Next

# Enhanced Standard Values Collection Tool



### Release 1

- Enhance existing portal to support New Records
- Progress started on Second Release Items

1

### Release 2

- Single Currency entry, Language Framework
- Enhanced in-line help
- New on-line grids
- Export/Import Registers
- Client Portal client setup/branding
- Skip logic for sections and questions
- Variance of % Change and Branding by Main Grouping
- General Workflow Improvement
- Communications Setup including reminders
- New Renewal Summary and Renewal Export reports

2

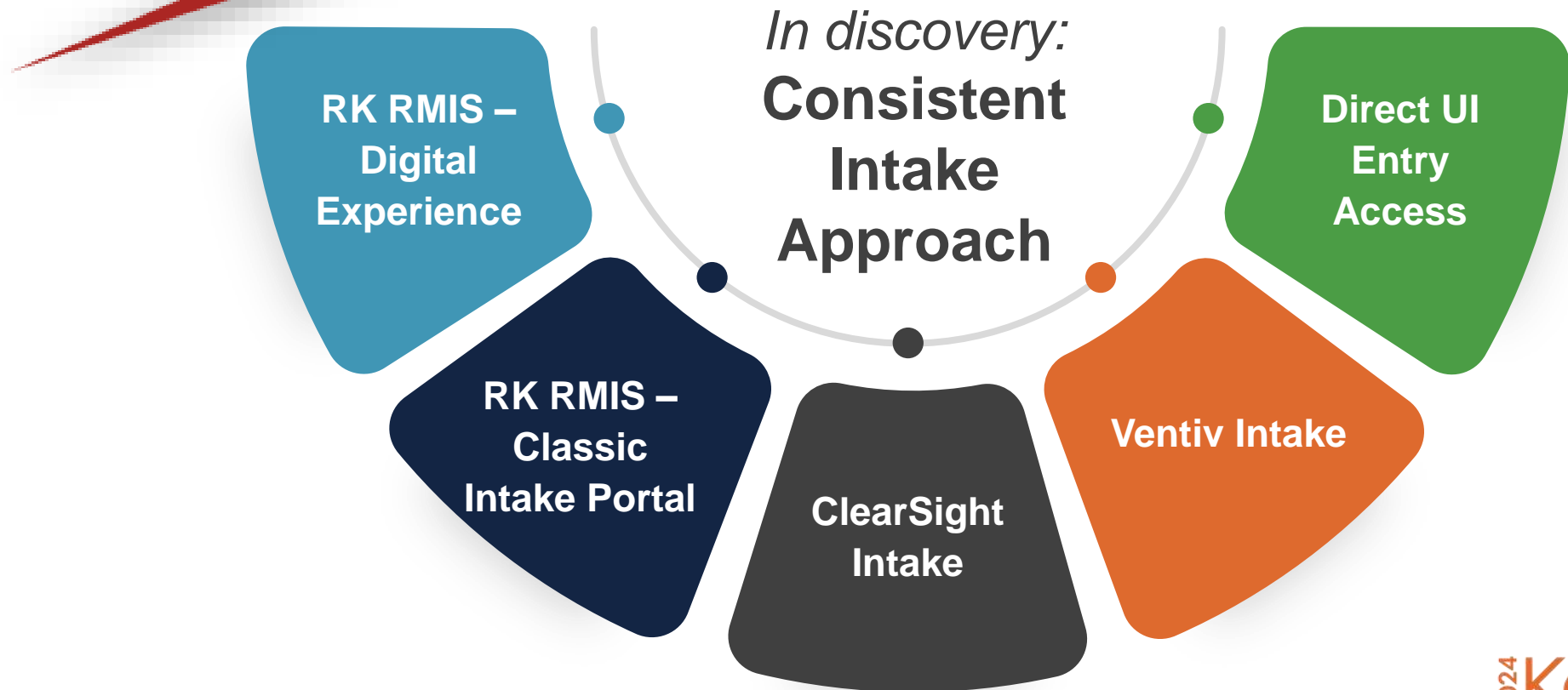
### Release 3

- Setup Process Wizard
- Value Collection Print
- Combine E-Mails for Communication
- Delegation of Sections, Register Records & Questions
- Export/Import Register support Related Record Tab
- Variance of % Change and Branding by Other Factors
- Multiple Language Support

3

## What's Next

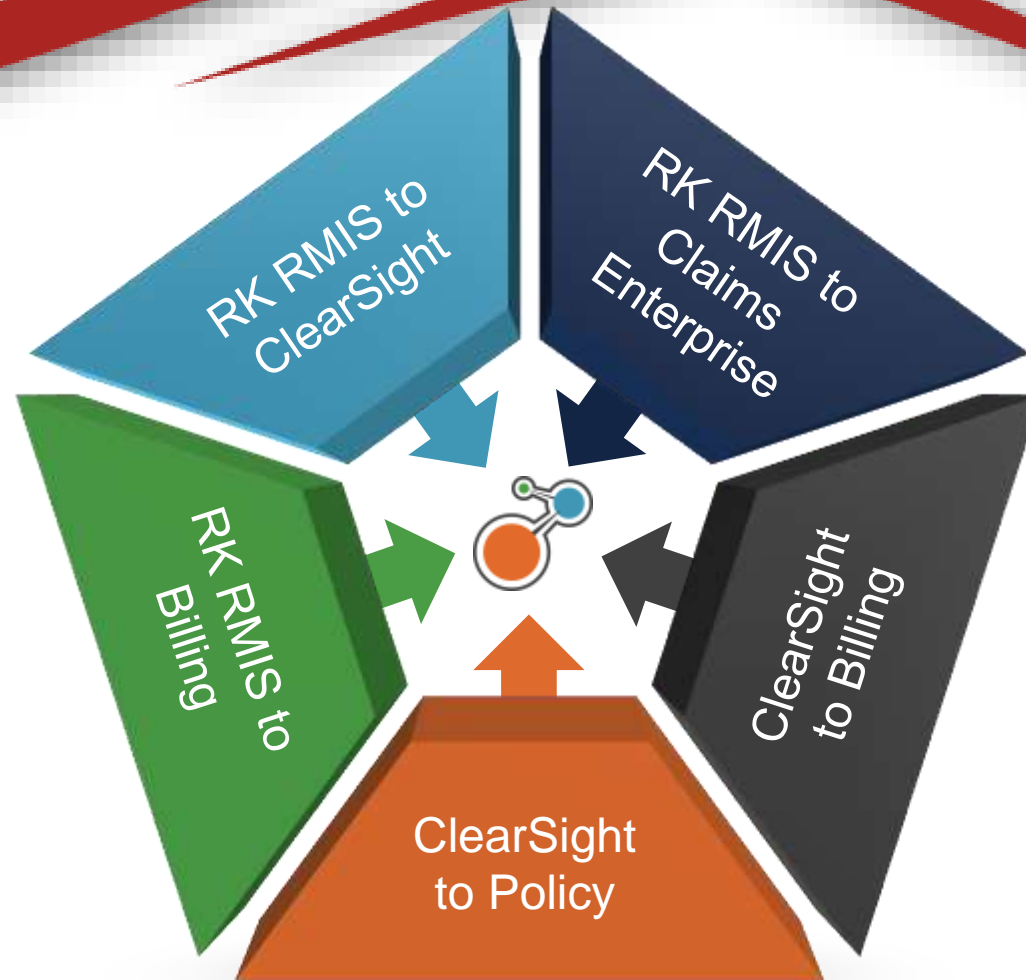
# Standardized Intake Approach



## What's Next

# Leverage Insurable Risk Across RK

Leverage use case-driven standard integrations to build right-fit solutions



# GET INVOLVED!

- Reach out to your Customer Success Manager (CSM) to get started with new features
- Set up a roadmap stewardship session
- Sign up for the product council
- Add ideas to the portal

CONNECT WITH ME.

PATRICK ESLICK

e: [Patrick.eslick@riskonnect.com](mailto:Patrick.eslick@riskonnect.com)

in [/in/patrick-eslick-49507519/](https://www.linkedin.com/in/patrick-eslick-49507519/)



**RISK** UNDER  
ONE **ROOF**