

# THE LIVING INTELLIGENCE BEHIND THE iPIPELINE PLATFORM



**CHARLi** is iPipeline's embedded AI engine — powering smarter, faster, and more connected experiences across the entire platform. While many solutions layer AI on top, CHARLi is deeply woven into the fabric of iPipeline, delivering real-time insights, intelligent automation, and personalized decision support — all behind the scenes.

Whether launching products, analyzing trends, reviewing policies, or selling in the field — **CHARLi helps you move with speed, clarity, and confidence.**

If you're using iPipeline, you're already benefiting from CHARLi. The first wave of CHARLi-powered features launched in Q3 2025, with more enhancements rolling out each quarter.

## KEY BENEFITS



### Accelerate Time to Market

Auto-generate new products from forms, rules, and rates



### Drive Operational Efficiency

Streamline workflows with intelligent, embedded automation



### Empower Smarter Selling

Deliver real-time product recommendations and health class assessments



### Improve Placement & Engagement

Enhance accuracy, clarity, and speed across every touchpoint



### Simplify Complex Data

Turn dense policy documents and analytics into plain-language answers

## HOW IT WORKS

**CHARLi is built on a secure, scalable infrastructure:**



### Cross-Portfolio Data Lake

Unified insights across Life, Annuities, and Wealth



### Intelligent AI Experiences

Natural language queries + Generative AI



### Data Interchange Layer

Seamless, secure data sharing across tools



### End-to-End Governance

Enterprise-grade security and compliance

*Continued on the next page...*



## CHARLi AT WORK: What It Powers Today (and What's Next)

CHARLi drives innovation across the iPipeline platform — powering tools today and laying the foundation for more to come.

### **iGO Evolve® – Revolutionizing e-Applications**

Powered by CHARLi | [Available Now for Captive Carriers](#)

Transform e-Applications with faster launches, flexible updates, and a modern, intuitive experience.

### **Policy Intelligence – Transforming Policy Documents into Clear Answers**

Powered by CHARLi | Embedded in DocFast® | [Launching in Q4 2025](#)

Search and understand policy content in seconds — not hours. Reduce placement risk and improve customer understanding.

### **Speed Score – Benchmark. Optimize. Accelerate**

Powered by CHARLi | Embedded in InsureSight® | [Launching Soon](#)

Benchmark carrier sales cycle times, identify bottlenecks, and accelerate from a 60-day journey to a 30-minute process.

### **Conversational Analytics – Turn Questions into Instant Insights**

Powered by CHARLi | Embedded in InsureSight® | [Launching Soon](#)

Ask questions in plain language and get real-time insights, dashboards, and trends — without code or delays. Instantly assess product performance, market position, and growth opportunities.

### **SmartSell – Sell Faster with Confidence**

Powered by Charli | Embedded in the e-App | [Launching Soon](#)

SmartSell turns the e-App into a dynamic, end-to-end selling experience. Agents can instantly determine health class, present coverage options, get automated underwriting decisions, and place the policy — all in one seamless process.



**Let's Bring CHARLi to Life in Your Business**

**[SCHEDULE A DEMO](#)**

[www.ipipeline.com](http://www.ipipeline.com) | 800.758.0824

