

INSURANCE · EMPLOYEE BENEFITS

An agentic operations console for an employee-benefits broker

Benefits brokers juggle employer onboarding, plans, quotes, renewals and service tickets across tools. Wexa built an operations console with a copilot that can do the work on screen, with a preview-and-confirm step on every change.

6

workspaces: onboarding, clients, plans, quotes, renewals, issues

Dozens

of copilot actions

100%

of changes previewed, confirmed and logged

CLIENT

US employee-benefits brokerage

REGION

US

WHEN

2025

ENGAGEMENT

Solution build

WEXA COMPONENTS

Operations console · copilot agent · preview-and-confirm actions · audit log

The challenge

- Onboarding and renewals tracked across spreadsheets and email
- Service issues handled ad hoc
- Assistants that can change data need guardrails

What Wexa built

- ✓ Console for onboarding projects, clients, plans, quotes, renewals, issues and reports
- ✓ Copilot that navigates and fills forms ("start onboarding for this client on 15 March")
- ✓ Preview → confirm-diff → write → audit-log pattern for every proposed change
- ✓ Admin, approvals, rules, integrations and documents pages

How it runs on Wexa

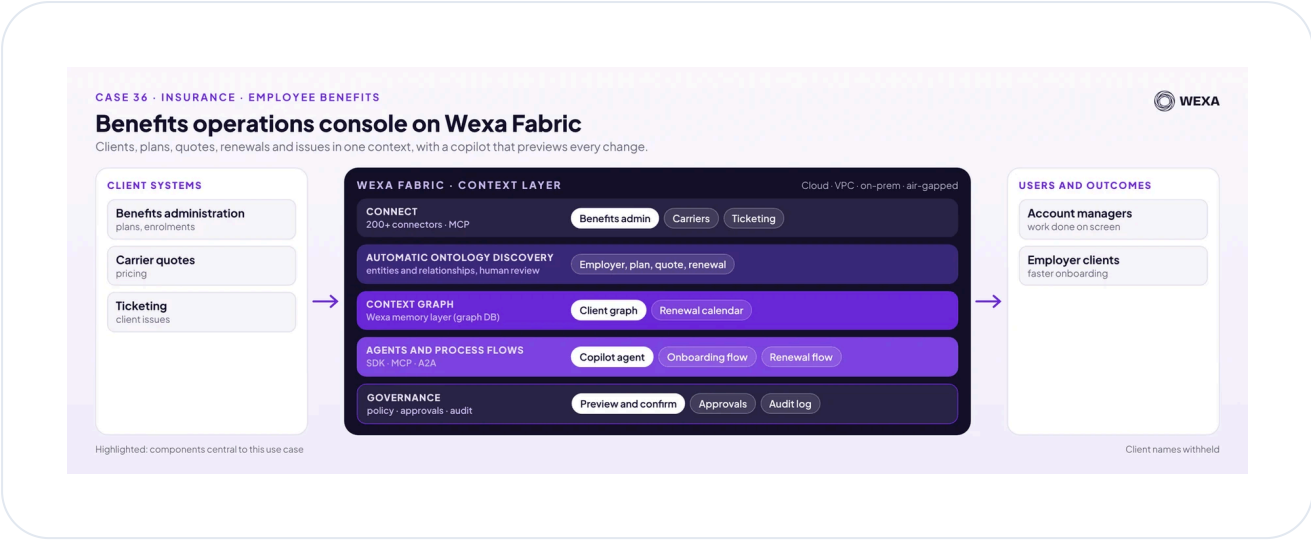


FIGURE How this use case runs on Wexa: client systems connected, ontology discovered, context graph in the Wexa memory layer, agents and process flows, and governance. Highlighted components are central to this use case.

Results

MEASURE	BEFORE / WITHOUT WEXA	WITH WEXA
Account managers for the same book of clients	20 managers	14 managers
Annual cost of the process	\$1.7M	\$1.2M
Time to implement the AI solution	4 months	4 weeks
AI build cost (one-time)	\$192K	\$15K
AI operating cost per year (models, infrastructure, upkeep, platform)	\$141K	\$69K

MEASURE	BEFORE / WITHOUT WEXA	WITH WEXA
Total AI cost in year 1	\$333K	\$84K

WITH WEXA

\$441K

net annual value to the client after Wexa's
own operating cost

4x

faster to implement

51%

lower AI operating cost

\$249K

less AI spend in year 1