Keylane Automate

Trusted AI on a proven foundation

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Keylane



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At Keylane since 2025

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The AI paradox in a regulated industry

AI promises speed, Its potential is no more the question, the use cases are numerous. Adoption in Life & Pensions requires control, risks management, safety, compliance. In a regulated industry, speed without governance is a blind spot. AI without a trusted foundation is not innovation, it's risk. **So how do you get both?**

Keylane Automate delivers the foundation that turns AI's promise into a trusted, auditable practice. This is how we put AI to work, governed by design.

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Agenda

01 Introducing Keylane Automate

02 Keylane AI Hub

03 Deep-dive on Automate components

04 Integration with Plexus and LeanApps Life

05 Governance by design

06 Takeaways & Timeline

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Introducing Keylane Automate

Trusted platform. Governed by design

Keylane Automate

The AI and orchestration layer for insurance and pensions.

- AI intelligence
- Connected workflows
- Control & oversight

One intelligent layer. **Every Keylane platform.**

- Plexus
- LeanApps Life
- Lifetime Life
- Obex

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One architecture. Numerous applications

Process improvements across the organisation



Retirement, Death, Divorce, Transfer out, Transfer in, Deferral, Scheme Switch	Keylane Plexus	**Members Lifecycle Orchestration** Every member moment lifecycle moment intelligently orchestrated	Keylane Plexus	Case closed timely, in full transparency
Benefit change, retirement eligibility, annual statement, … triggers a comm. event	Keylane Plexus	**Members Communications** Member receives timely, accurate, personalized communication, any language	Keylane Plexus	Personalized communication
Member contact, complaint or service request creates a task	Keylane Plexus	**Intelligent Service Assistance** AI assisted case resolution with preparation, suggestions, drafts.	Keylane Plexus	Average handle time reduced, better service
Pension holder unreachable	Keylane Plexus	**Find the Unfindable** Anticipates pension holder identification and retrieval of contact information	Keylane Plexus	Pension holder contacts updated

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Keylane Automate components

Unified orchestration layer that runs business processes on the core — visual design, event-driven, AI-ready.

AI Hub

Automate Workflows

- Designer
- Case Manager

Automate Marketplace

- Catalog
- Developer portal

Automate Control

- Governance, risk & compliance

Automate Connector

1. ↑ Domain events
2. ↓ Execute tasks
3. ↕ Domain data
4. ↕ Embedded chat

Keylane Core System (Plexus, LeanApps Life, …)

Product Setup	Policy Administration	Analysis & Reporting	Automation	Integrations
Employment, Legal, Party, Agreements, Configuration	Changes, Advancement, in/out Events, Claims	Financials, Calculation Kernel, Data Mart & Reporting, Output	Collections, Workflow, Disbursements, Batch	Internal & external

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What's unique about Keylane Automate

Two differentiators no other workflow platform combines



Governance by design

- Nothing runs until approved
- Every asset classified before it ships
- Human in the Loop, built-in not bolted on
- Guardrails at runtime
- Your data stays yours



Native to the core

- Custom nodes SDK: platform events & activities
- Bidirectional domain data exchange
- Composable for any orchestration model
- One connector, every core platform
- Integration becomes simple, stays open

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Compliance and integration are **native** to the platform, not add-ons - reducing risk, audit burden and integration cost **simultaneously**

Packaging / Four ways to put AI to work

AI **in** platform

AI **on** your platform

01

Embedded AI

AI assistance inside the Keylane screens your teams already use. Nothing to build, nothing to host.

For you if: you want results in daily operations without starting a project.

02

Connect

Governed API and MCP access to the core for agents you build and run yourself, with a developer portal, SLAs and usage visibility.

For you if: your own AI team wants to build against real core data and actions.

03

Workflows

Design and run automated processes in a visual designer, with a case manager for human review and an AI Hub that keeps models under control.

For you if: you want end-to-end automation without assembling your own stack.

04

Enterprise

The full platform: premium insurance agents, custom agent development and one governance model for every agent you deploy.

For you if: you are taking agents into production and require complete control and governance.

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Keylane AI Hub

AI Hub

Automate Workflows

orchestrate intelligent workflows

- DESIGNER
- CASE MANAGER

Automate Marketplace

discover and deploy trusted agents

- CATALOG
- DEVELOPER PORTAL

Automate Control

ensure security, compliance and control

- GOVERNANCE
- RISK & COMPLIANCE

AI Hub: A persona-centric experience

CIO / Business

Workflow Builder

Designs and automates end-to-end processes, no coding required.

Business

Case Manager

Handles day-to-day case work, AI review and oversight (Human in the Loop, and guides cases to resolution.

CIO

AI Hub Admin

Governs teams and user access across the AI Hub for the wider organisation. Monitors usage and credit balances.

CIO / Business

AI Developer

Builds, tests, and integrates custom AI agents and services within the Keylane platform.

CEO

Compliance Manager

Oversees governance, risk and compliance readiness and operational processes.

Business

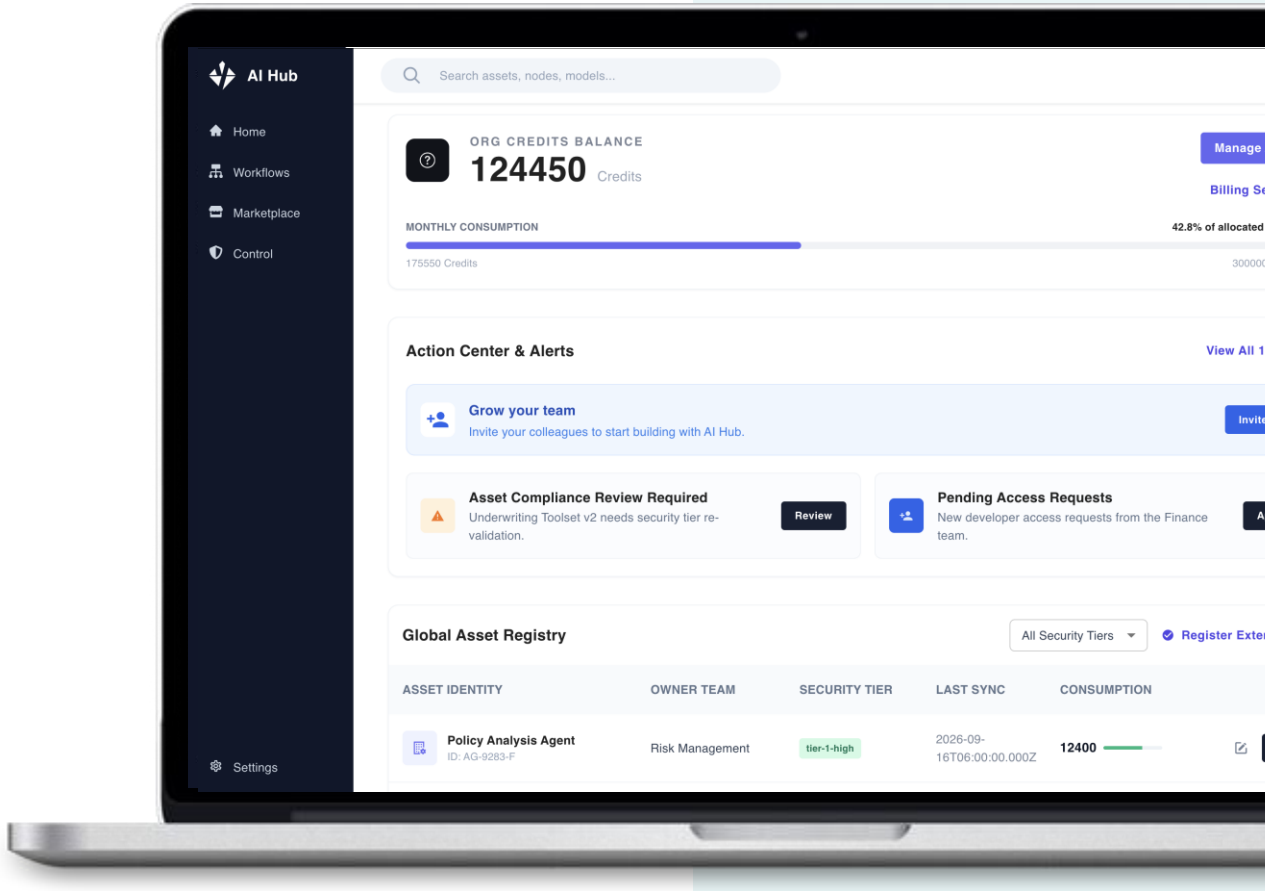
Business Analyst

Explores assets, defines requirements, and measures the impact of automated processes.

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AI Hub

- Customer onboarding
- User onboarding and team access
- Launchpad for all AI services
- Usage tracking



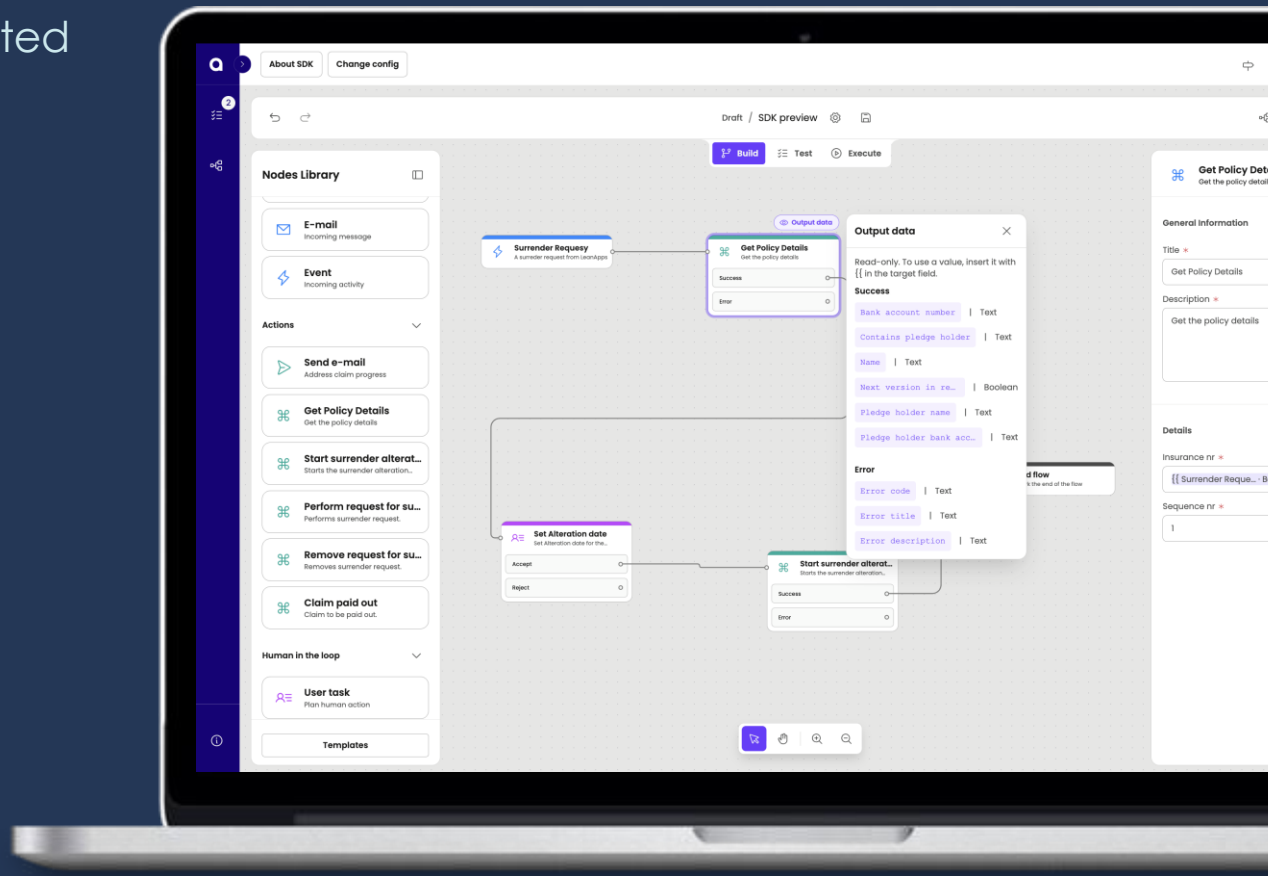
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Deep-dive on Automate components

Automate workflows Designer

Rapid development of insurance & pensions AI-augmented workflow applications. Combines deterministic and probabilistic approaches.

- Visual, no code experience, from ideas to apps in minutes/hours. AI as first class citizen.
- Built-in core systems connectors, removes the need for an integration layer. Open SDK.
- Workflow triggers, Control logic, Human-in-the-loop, Work assignment and management. Workflow data mapping.

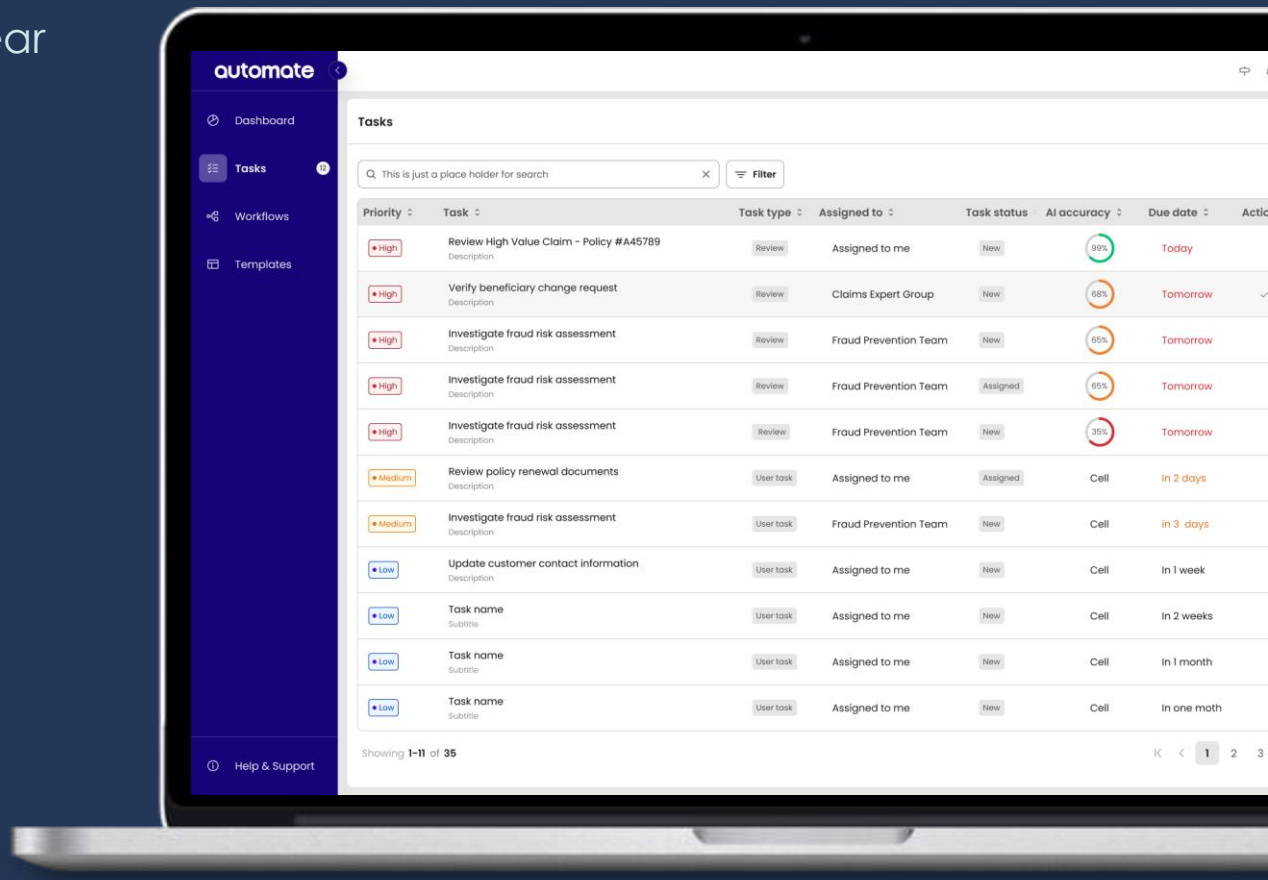


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Automate workflows Case Manager

One prioritised task list across multiple workflows, with clear ownership, priority, and due dates on every task. Faster resolutions, nothing missed.

- Tasks ranked automatically by SLA, urgency and case complexity, so the right work surfaces first.
- Smart work assignment: Tasks routed to the right person or team.
- Human-in-the-loop control: Review, override or escalate any task, with full visibility and audit trail.

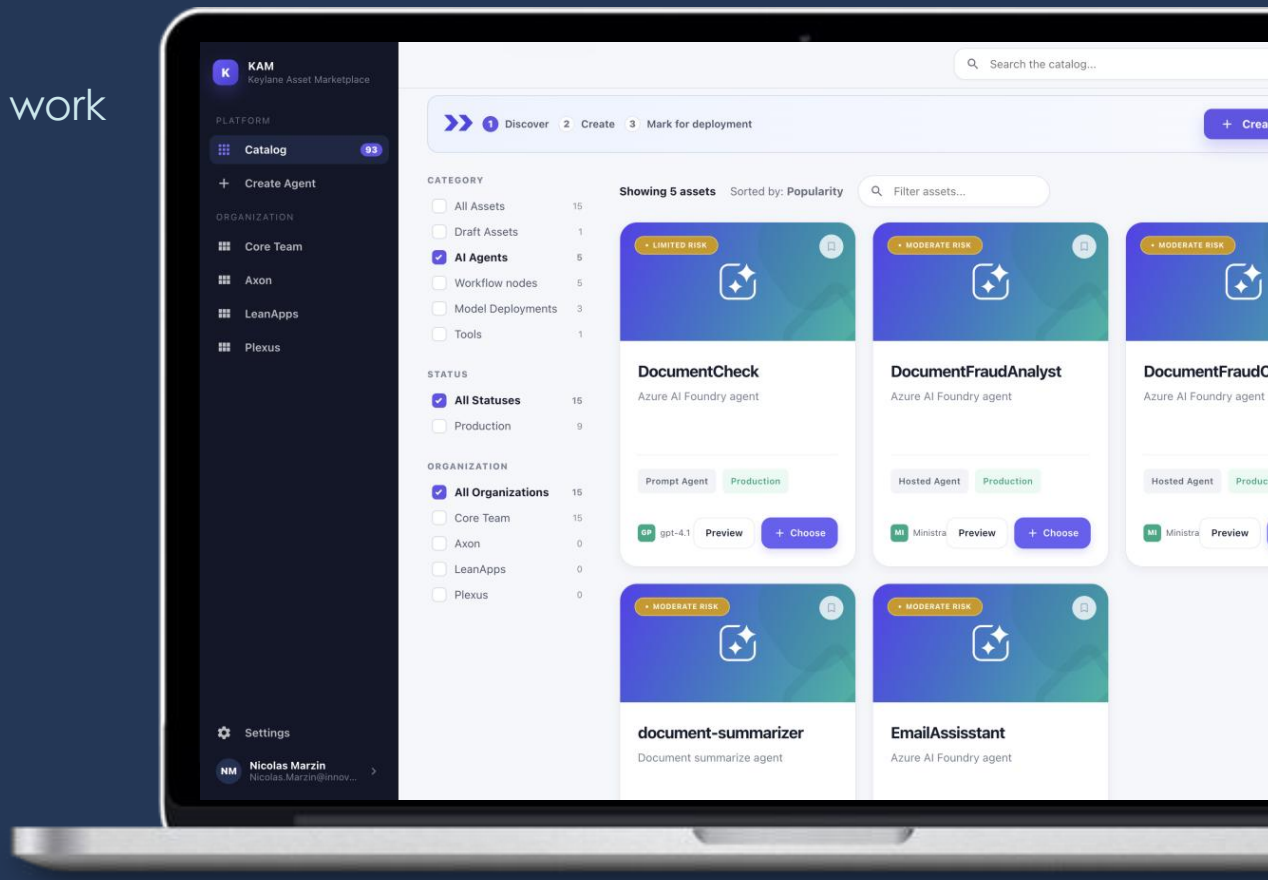


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Automate Marketplace Catalog

A curated catalog helps teams find approved workflow components and AI-enabled assets, reducing duplicate work while keeping reuse within a governed lifecycle.

- **Discover what is ready:** Browse reusable assets with a clear purpose, owner and lifecycle status.
- **Reuse with confidence:** Start from approved assets rather than rebuilding common capabilities.
- **Publish with ownership:** Register and scope each asset before it is used in a pilot or production.
- **Stay in control:** Review, approve, activate, suspend or retire assets as needs change.

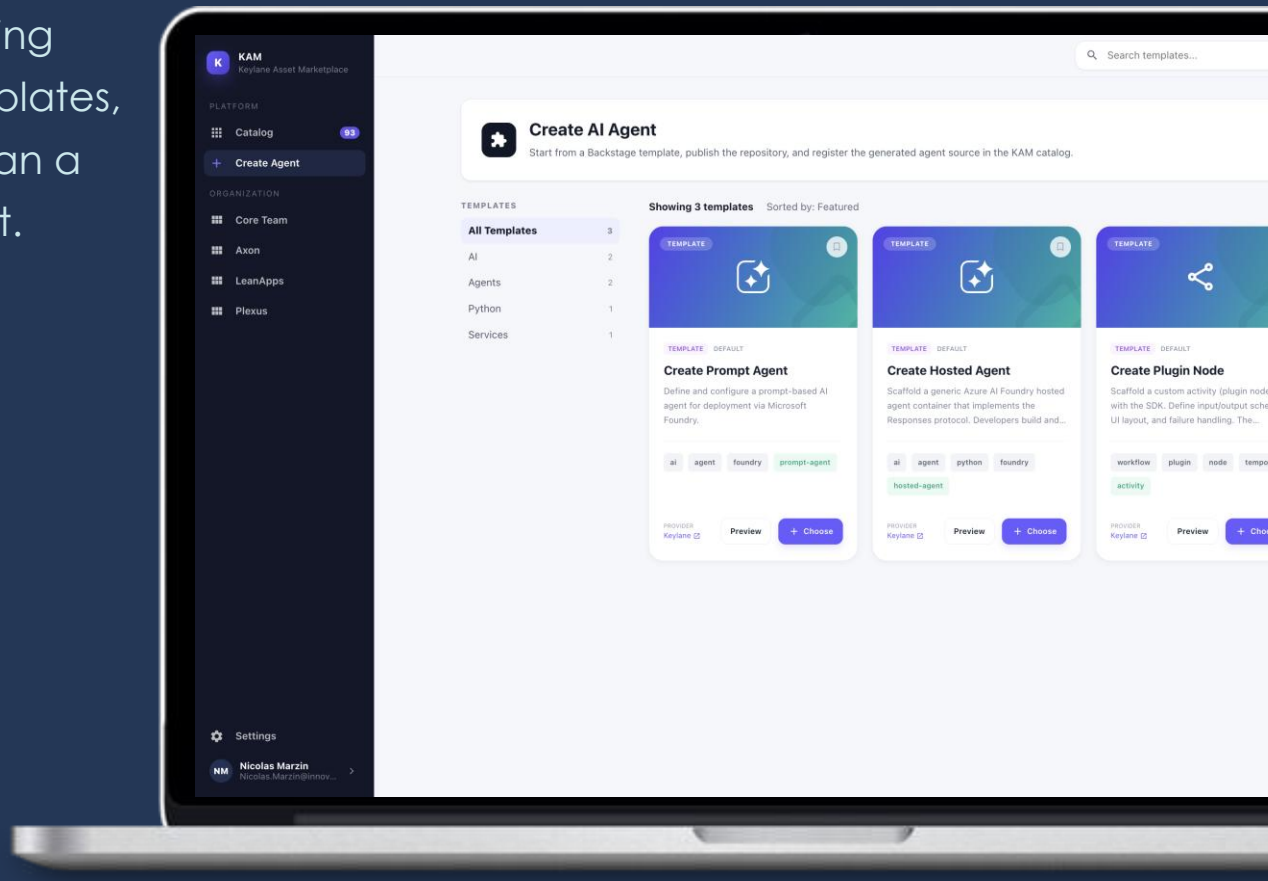


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Automate Marketplace Developer portal

Guides the developer through building, integrating and testing new assets. Scaffolds new AI projects with ready-to-use templates, so developers can start from a working foundation rather than a blank page. Then prepares asset for review and deployment.

- **Start with a template:** Choose a starting point for an agent, tool or AI-enabled workflow.
- **Scaffold the project:** Generate the initial structure and configuration.
- **Build with guidance:** Follow a clear path to connect approved assets, test behaviour and refine the solution.
- **Prepare for release:** Document ownership and intended use before submitting the asset for review.

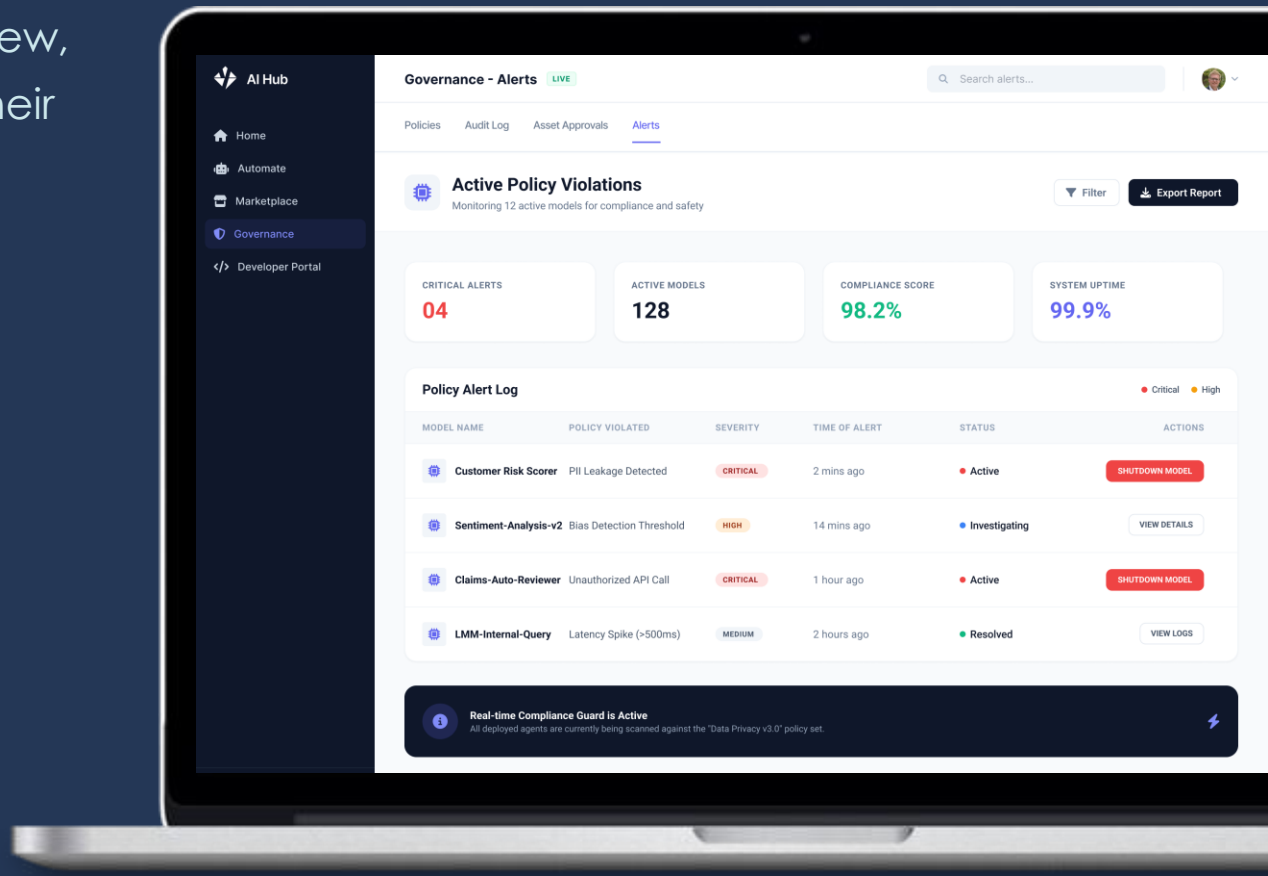


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Automate Control: Compliance Manager

Brings policy and guardrail violation alerts into a single view, so Compliance Managers can spot issues, understand their impact and coordinate a response.

- **Detect and alert:** Surface policy and guardrail violations as they occur.
- **Assess the impact:** See the affected asset or workflow, the rule breached and the relevant activity.
- **Take action:** Assign an investigation, request a change, suspend an asset or escalate the issue.
- **Track to resolution:** Record decisions, remediation and approval before an asset is reactivated.



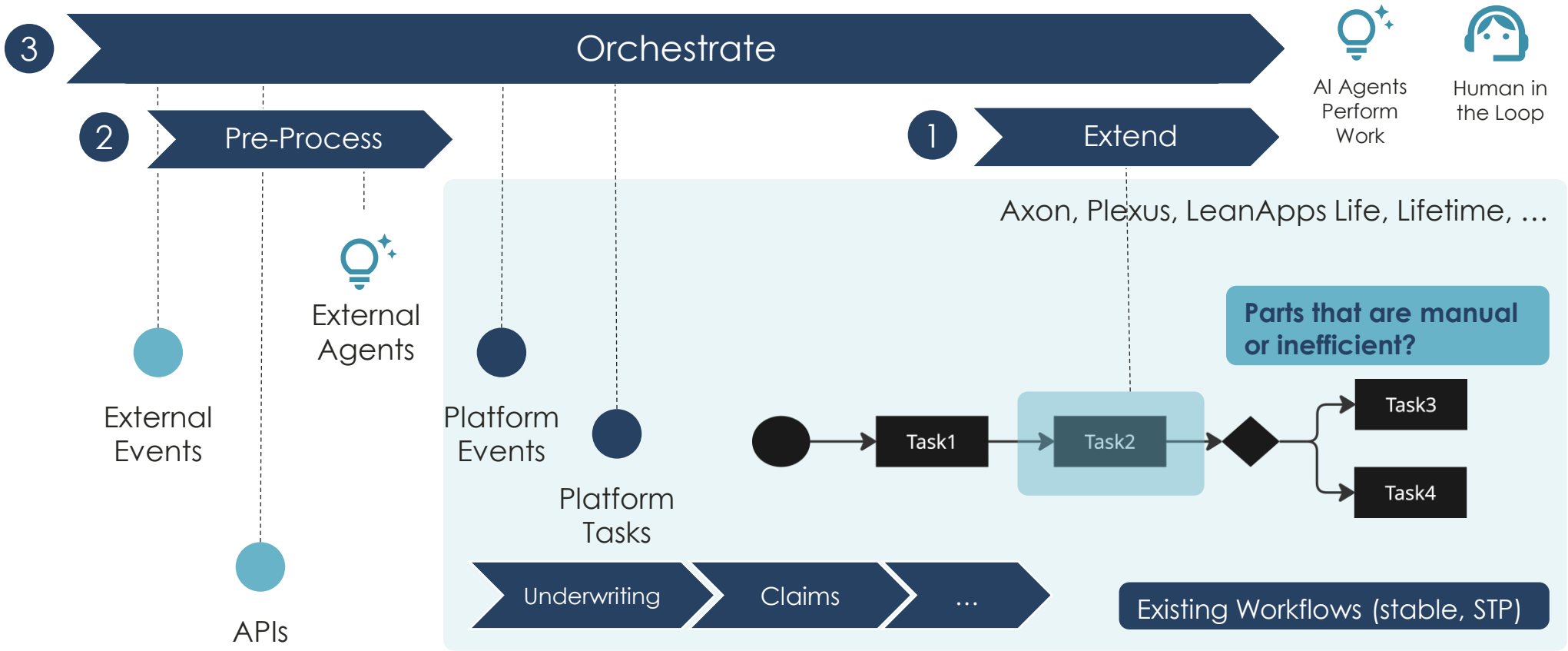
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Integration with Plexus and LeanApps Life

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Platform augmentation use cases

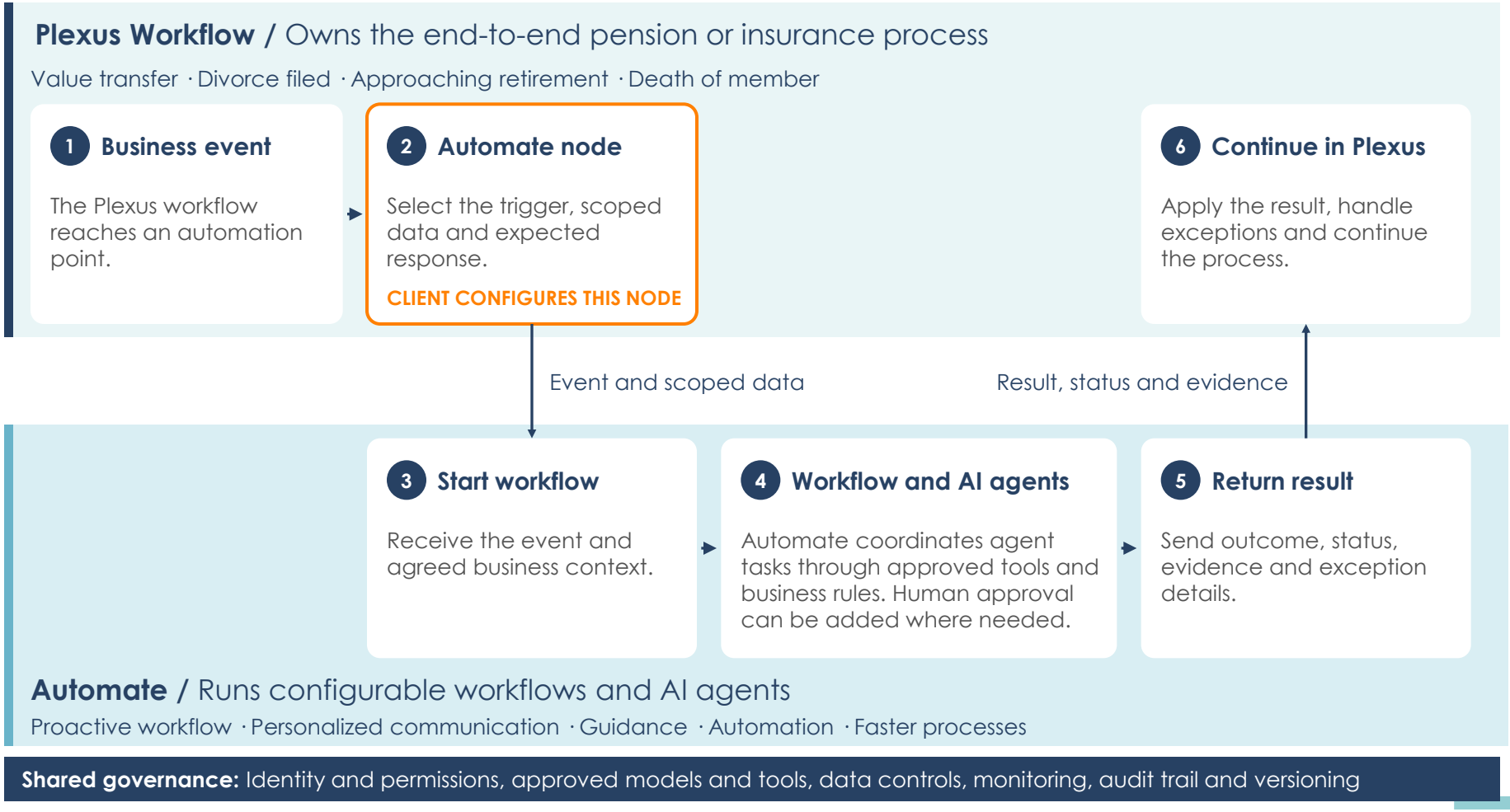
Rapid innovation while de-risking the core: 3 main scenarios



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Extend Plexus workflow with Automate

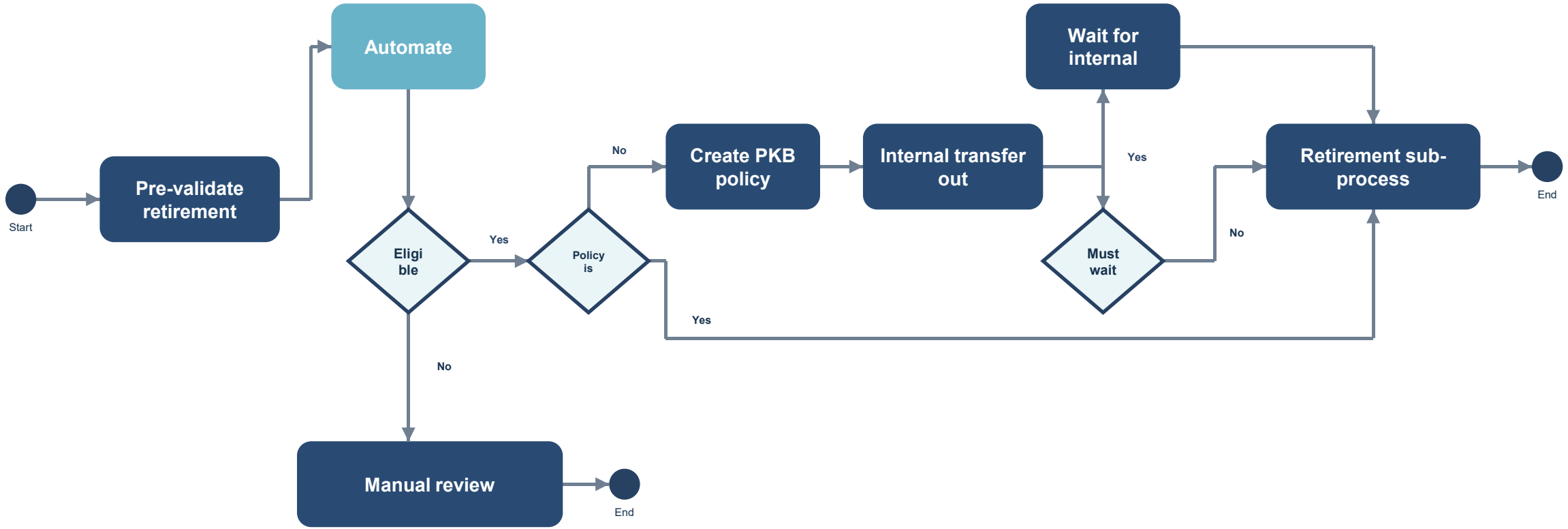
Clients configure an Automate node in Plexus. Automate runs the selected workflow and agents, then returns the result to the core process.



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Example: Retirement eligibility flow

An illustrative Automate workflow behind step 2 (“*Automate node*”) on the previous slide.



Embedded AI in LeanApps Life

Turn every policy screen into a guided, governed action point.

Embedded chat brings AI directly into LeanApps Life so users can ask, understand and act in context: accelerating service, simplifying operations and connecting conversations straight into workflows.

From conversations to actions, without leaving LeanApps Life.



In-context service

Users can trigger actions such as starting a surrender directly from the policy they are viewing, reducing navigation and handoffs.



Faster operations

Chat is connected to workflows, case handling and core tasks, helping teams move from question to execution in one experience.



Governed by Design

Every agent is owned and scoped, with formal approval gates and lifecycle control from create to retire.



AI Transparency

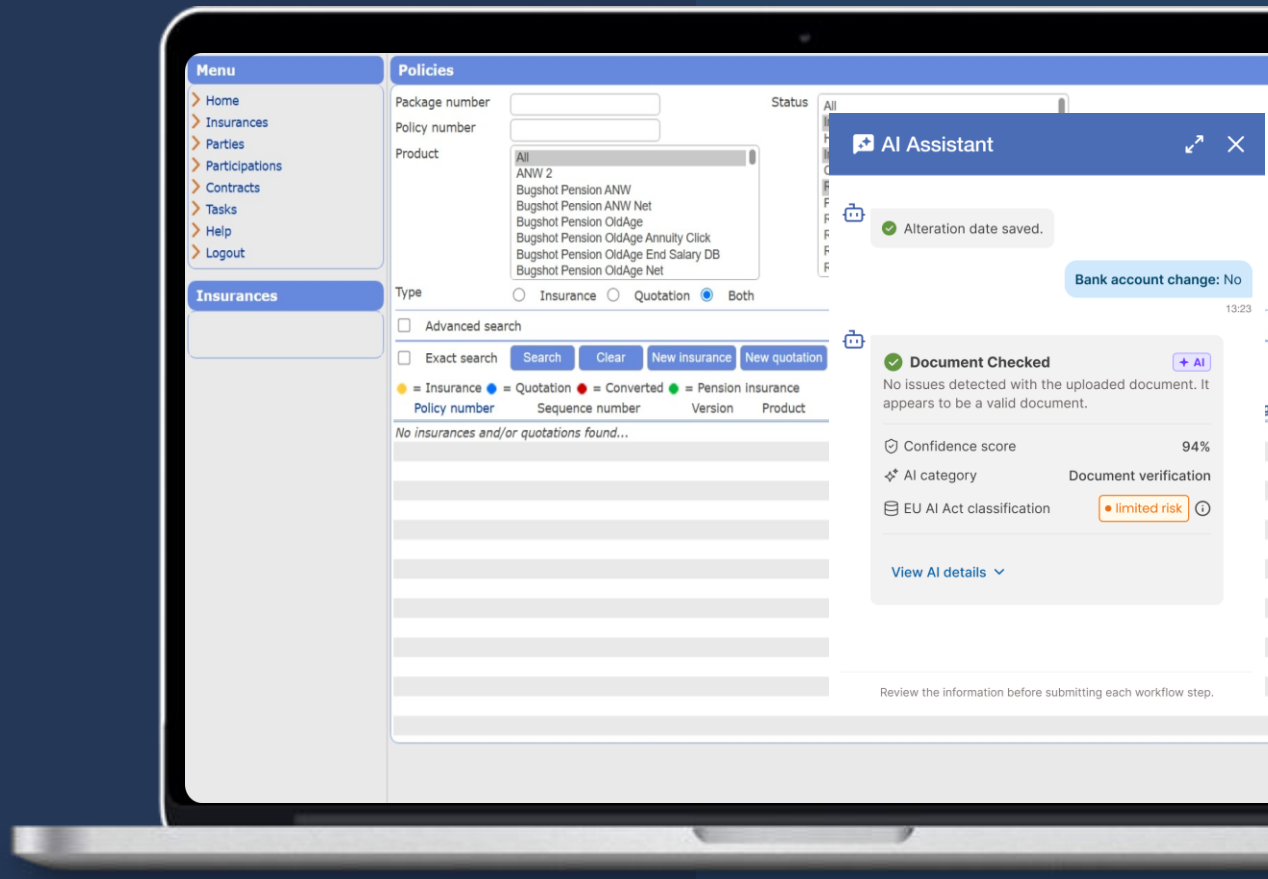
Users are clearly informed that they are interacting with AI from the first interaction, meeting EU AI Act transparency obligations for chat-style experiences.

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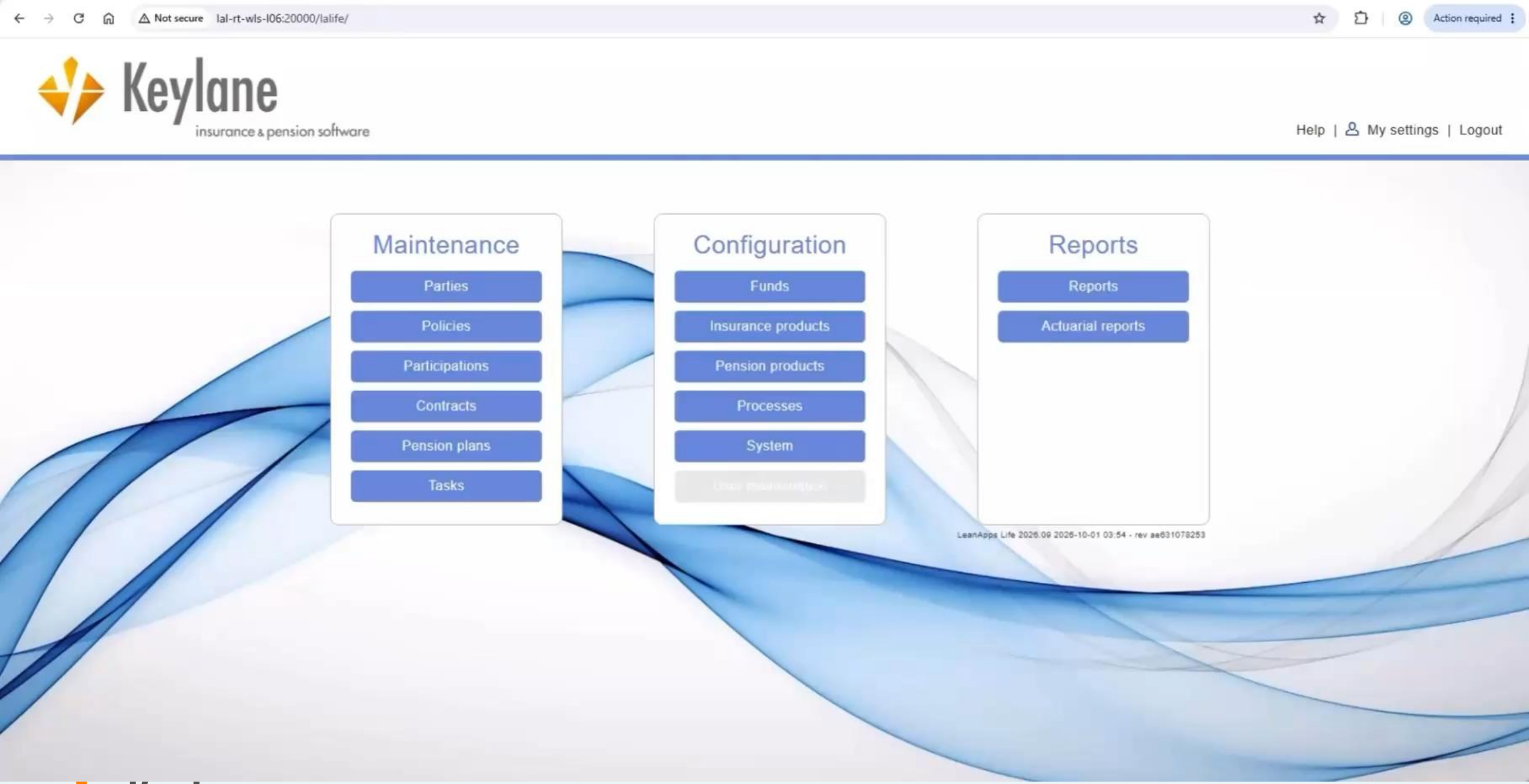
Example use case: Policy surrender

Guides the user through the required information and documents, validates eligibility and values, routes exceptions for human review, and creates a controlled case through to approval, payment and customer confirmation.

- Start surrender directly from the relevant policy.
- Workflow drives questions, decisions and actions and involves user as needed.
- AI-assisted (document processing, fraud).



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Not secure
lal-rt-wls-l06:20000/lalife/
Action required
Keylane
insurance & pension software
Help | My settings | Logout
Maintenance
Parties
Policies
Participations
Contracts
Pension plans
Tasks
Configuration
Funds
Insurance products
Pension products
Processes
System
Reports
Reports
Actuarial reports
LeanApps Life 2026.09 2026-10-01 03:54 - rev ae631078253

Governance by design

Keylane Automate / Governance by design

Governance is not a document you write afterwards. It is not just a feature. It is the platform itself.

Speed without governance is a dangerous blind spot.

There should be no route for shadow AI.

Life & Pensions is innovating fast, and governance has to keep pace.



AI Governance

Every agent, model and workflow asset registered in a central inventory, with a named owner, a scoped purpose and formal approval gates.



EU AI Act Readiness

Every use case classified and documented before it ships, and reclassified when its purpose or its data changes.



Data Protection

GDPR controls under your documented instructions. Your personal data is never used for training, fine-tuning or benchmarking.



Lifecycle Assurance

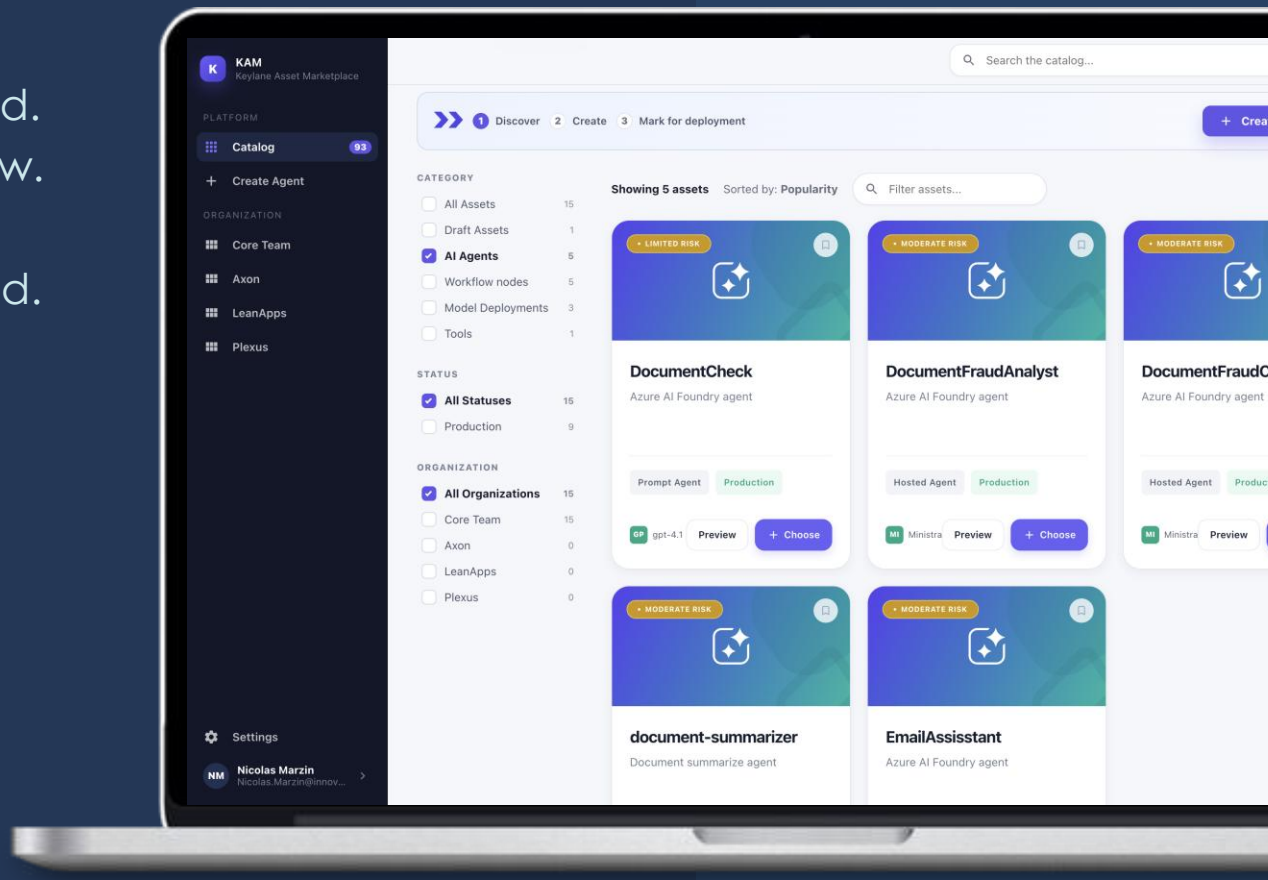
Scheduled review by risk and sensitivity, with a route to suspend or retire an asset after go-live – not only before it.

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Nothing runs until approved

A central AI inventory tracks every agent, model, tool, workflow asset and Marketplace asset developed or used. AI assets can only be invoked from an Automate workflow. There is no route to shadow AI. Unapproved, suspended, expired or retired assets cannot be activated or executed.

- Registered before use – entered in the inventory before pilot or production.
- Owned and scoped – named owner, purpose, permitted use and lifecycle status.
- Formal approval gates – create, review, approve, activate, suspend, retire.
- Version controlled – agents, prompts, models, templates and your configurations.

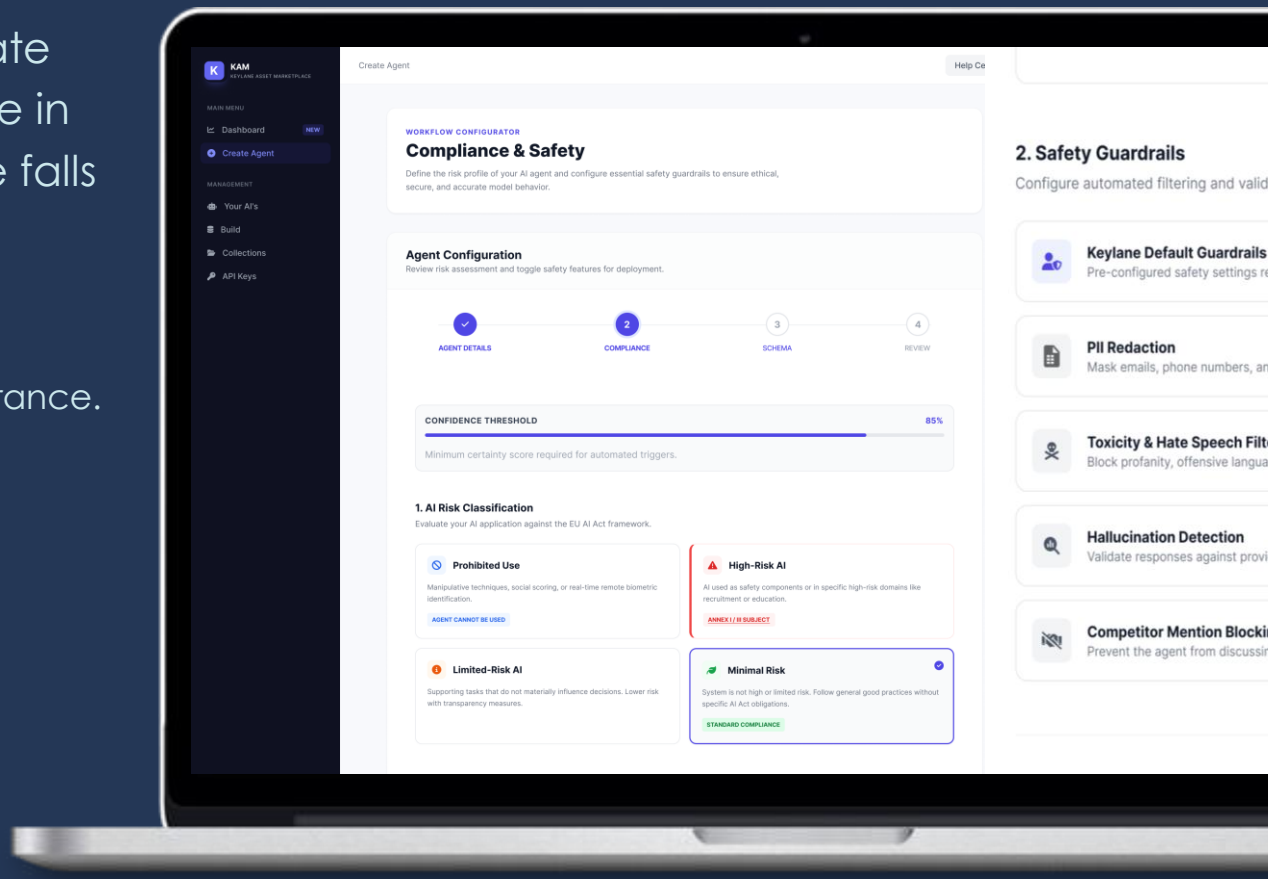


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Every asset is classified before it ships

The EU AI Act is not a blanket prohibition. It is proportionate obligation by risk class – and knowing which class you are in before you build is most of the work. In our sector the line falls in a specific, knowable place.

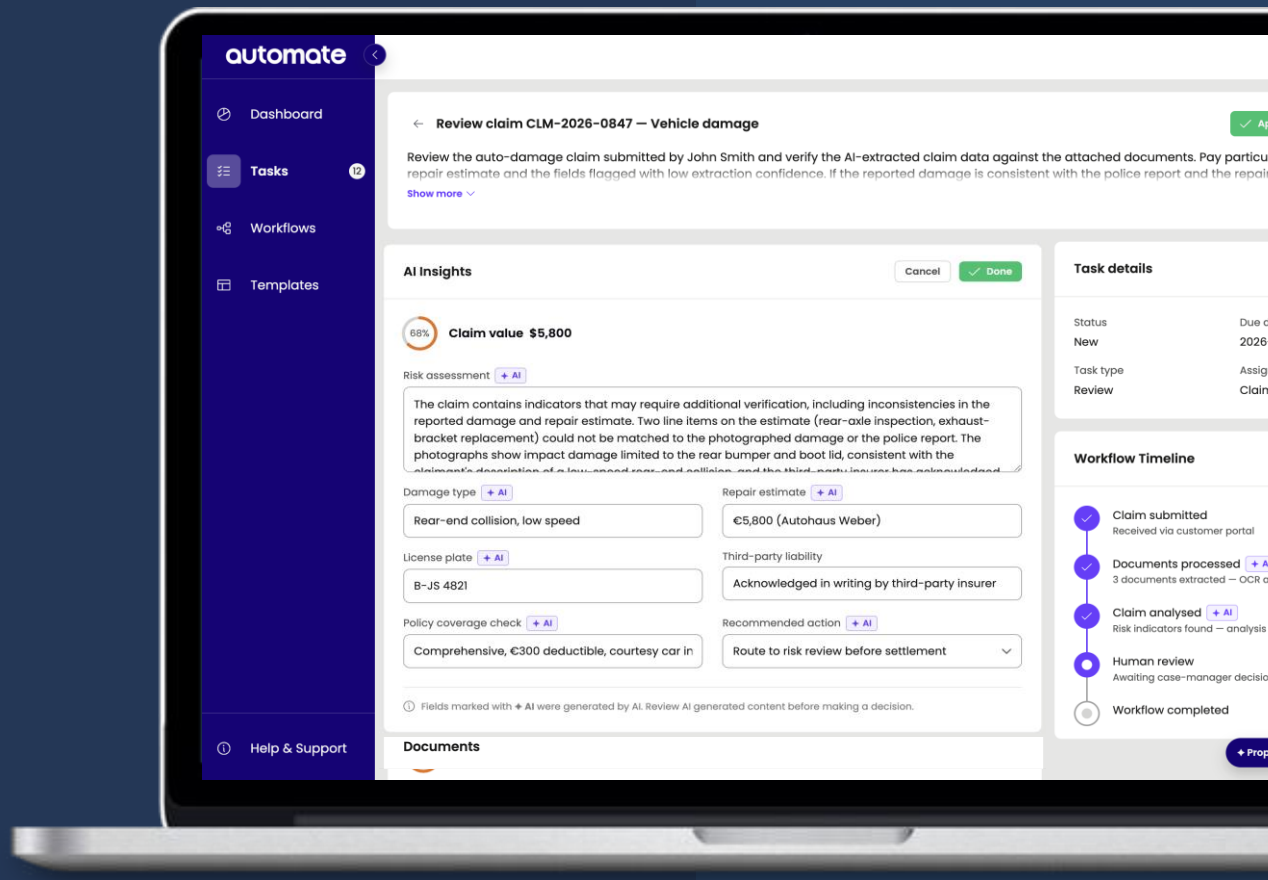
- **High Risk**
  Annex III.5(c): risk assessment and pricing for life and health insurance. Underwriting, risk scoring and claims agents. Legal sign-off first.
- **Limited Risk**
  Transparency duties where people interact with AI or see AI-generated content: chat, summaries, classifications and drafts.
- **Minimal Risk**
  No mandatory obligations under the Act. Still registered, owned and version-controlled; reclassified when purpose or data changes.



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Human-in-the-loop is built-in, not bolted on

- **AI transparency :** Per field AI marker telling the user "the value comes from AI"
- **Accept, edit or reject:** The handler stays in control and can override the AI.
- **Confidence score:** Every AI output carries a confidence indicator for the case handler.
- **Human review:** The handler reviews the output in Case Manager before it takes effect.

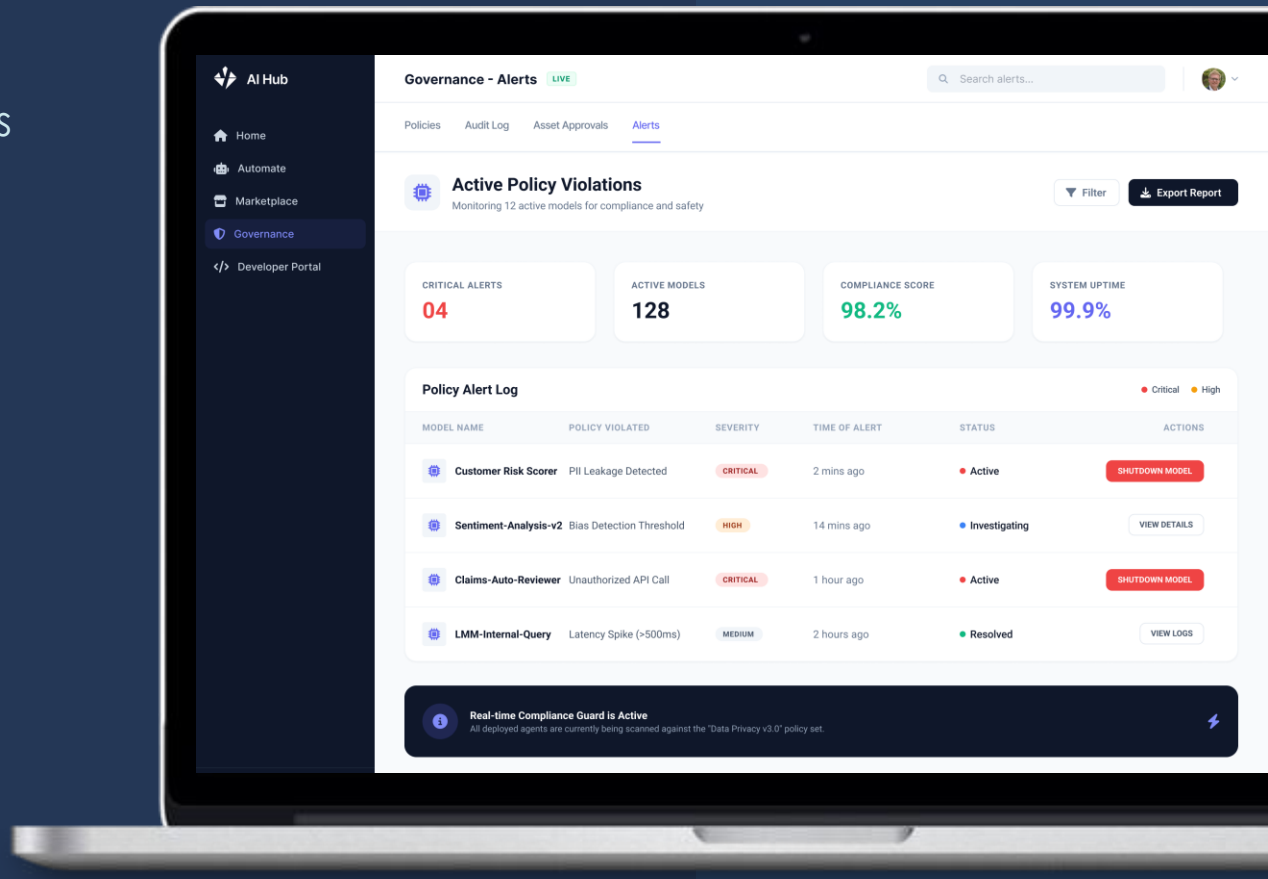


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Guardrails on every AI asset

AI Guardrails at runtime, AI Hub is your control tower. Compliance manager evidence. Early alerts and actions logged. Suspend or retire suspicious assets.

- Harmful content filtering
- Jailbreak, prompt injection shields
- Groundedness checks on output
- PII and sensitive data detection
- Tasks drift



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Takeaways & Timeline

Key takeaways

01 Keylane automate adds an independent AI-Orchestration layer to the core platforms you already have in place (Plexus, LeanApps Life, Lifetime).

02 You own the control, we ensure speed and safety for you: governed by design, no blind spot.

03 Versatile platform for you to achieve innovation, efficiency and effectiveness. High value, proportional to ambition.

Timeline

Today (Oct 8th)

Product launch
LAL demo (surrender)

Oct-Nov-Dec

Discovery and POCs
with selected customers

Q4-26

MVP completes
Feedbacks from POCs
with early adopters

Q1-27

Beta period
Early access
program

Q2-27

MVP
Production-ready

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INNOVATE

AI co-innovation program

Collaborative discovery

Initial focus on collaboration and identification of high value use cases to accelerate mutual success.

Joint development

Opportunities for joint development of innovative solutions tailored to real-world business challenges.

User-centric design

Leverage design-thinking workshops and UX-first approach to create intuitive, powerful experiences that delight users.

Thank You!

Let’s meet and explore your AI, automation and orchestration opportunities and use cases.

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