



WILL AI REPLACE ME?

Insurance Account Manager

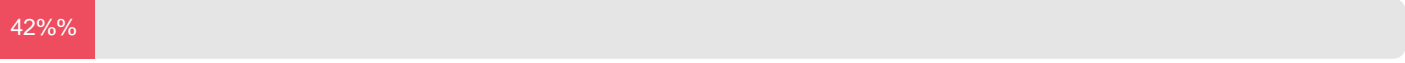
Banking, Finance, Insurance, Real Estate

Our analysis suggests that a significant portion of the tasks within this role could potentially be automated, especially those related to the standardization of sales processes, technical and administrative contract setup, and product promotion.

However, it also indicates the importance of maintaining human expertise and interaction for personalized advice and complex decision-making, underlining the blend of technology and human skills necessary in this profession

Automation degree: 42% %

Significant Impact of AI on the Job



Main tasks

This section reviews the 3 main tasks associated with the job studied and assesses the potential level of automation induced by AI (« **AI Automation Impact** »). The modeling uses 8 criteria detailed on the « **Methodology** » page.

Tasks	AI Automation Impact
Informs and advises individuals and businesses on property and personal insurance (fire, accidents, retirement, providence, ...)	Moderate
Proceeds with the sale of products and services according to the commercial policy of the establishment and insurance regulations	Significant
Conducts the technical (pricing project, ...) and administrative setup of contracts.	Significant

Impact on skills

At-risk Skills ↓

Analyze a client's financial situation	Financial analysis tools and AI can increasingly perform comprehensive assessments of income, debt, legal frameworks, and repayment capacities, automating detailed financial checks.
Manage complaints and disputes	For initial levels of customer support (level 1 and level 2), many aspects of handling complaints and disputes can indeed be automated. Automated systems and AI can categorize, prioritize, and even resolve basic issues based on predefined criteria, making this skill more susceptible to automation than initially assessed.

Future-proof Skills ↑

Develop and maintain client relationships	The ability to nurture and sustain client relationships, understanding and adapting to their evolving needs, remains a deeply human skill, essential for client satisfaction and loyalty.
Compile a credit application	That skill goes beyond proficiencies in data collection. It involves critical analysis, judgment, and the crafting of tailored financial recommendations. The nuanced nature of financial health assessment and the necessity for personalized advice underscore the enduring value of human expertise in navigating the intricacies of credit evaluation and decision-making.

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