Kaustubh Jain

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MANAGEMENT CONSULTANT

Consultant with proven experience in Generative AI, automation, and analytics to drive outcomes across insurance and reinsurance. Delivered $2.35M+ through RFPs, built real-time reporting systems, and streamlined KPI workflows. Skilled in Power BI, Power Automate, and translating complex data into actionable insights

KEY COMPETENCIES

Data Analysis and Insights	Project Management	Strategic Planning and Execution
Business Process Automation	Technical Documentation & BPMN	AI and Emerging Technologies
Stakeholder Engagement	Business Intelligence and Reporting	UAT Planning and Execution

AI & TECHNICAL COMPETENCIES

Conversational AI Tools	**LLM Development & Deployement**	**Business Applications**
General: ChatGPT, Claude, Gemini	NVIDIA AI Workbench	Power Platform (PowerBI, Power
Research: Perplexity AI, Elicit, Consensus	LM Studio (local LLMs)	Automate, Power Apps, etc)
Code: GitHub Copilot, Continue	Python, R	Replit
Local LLM: Hugging Face Transformers	Prompt engineering for GenAI tasks	Confluence/JIRA

PROFESSIONAL EXPERIENCE

EXL Service (NASDAQ: EXLS)   **Jun 2023 - Present**
Manager - Insurance AI Consulting

GenAI PoCs & Demo Development
- Built GenAI PoCs for a **large retirement provider**, a **major L&A carrier**, and a **national group benefits provider (5+ demos)**
- Created a **retirement sales demo** producing **AI-driven win strategies** using market intelligence and past deal patterns
- Developed an L&A claims demo **automating intake, processing, and human-in-the-loop review** for audits and exceptions
- Built a group benefits demo **generating automated return-to-work plans, context-aware messages, and follow-ups**
- Partnered with cross-functional teams to present demos and quantify adoption potential, cost estimation and ROI

C-Suite Business Intelligence Solution
- Analyzed business requirements and translated reporting needs into interactive Power BI dashboards and KPI frameworks
- Mapped current state data workflows, identified process inefficiencies, and **optimized data pipelines through automation**
- Developed live reporting capabilities with auto-refresh functionality, **reducing data latency from a week to under seconds**

Generative AI Complaint Response Automation
- Collaborated on a pilot **Generative AI solution using Copilot to automate complaint response letter** for a reinsurance client
- Designed an Excel-based mapping linking complaint data to structured response content, streamlining content generation

Third-Party Administrator (TPA) and Business Continuity Management
- **Led business impact assessments & business continuity planning**, including creation & management of reporting dashboards
- Spearheaded a BCM Refresh initiative for a reinsurer, **reducing execution time by 50 percent through lean methodologies**
- **Developed process maps and customer journey flows** to document current state processes across TPA and internal operations

Workflow and Process Automation
- **Built automated workflows with Power Automate** to extract contact center KPIs from Outlook and visualize them in Power BI
- Implemented process control workflows for version tracking and regular documentation check-ins, ensuring compliance

RFP Development and Strategic Enablement
- Created over **20+ client proposals and 30+ RFP decks**, contributing more than **$2.35M in revenue** for life and annuity clients
- Led proposal development for a major mutual insurance's front end claim UI, **impacting 39M+ customer claim experiences**
- Analyzed key offshore operations data of a L&A client to **reduce AHT by 25%**, **lower CPC by 15%**, and **improved NPS ratings**

Wiz Freight   **Apr 2022 - Jun 2022**
Product Management Intern
- Proposed 5+ product enhancements to improve efficiency, usability, and system reliability for the sales department
- Led implementation strategies and key configuration parameters to support global localization and multi-region deployment

EDUCATION & CERTIFICATIONS

Masters of Business Administration (IIM Indore)
Majors: Strategy, General Management, New Product

Bachelor of Arts: Foundations of Management
Indian Institute of Management (IIM) Indore

NVIDIA Certified Associate GenAI and LLM
NVIDIA

Lean Six Sigma Green Belt
KPMG

FMLI Level 1
LOMA

Microsoft Office Specialist: Excel 2016
Microsoft

EXTRACURRICULAR ACTIVITIES

Media & Communications Head – TEDxIIMIndore
Indian Institute of Management (IIM) Indore

Vertical Coordinator, Coverage – i5 Summit
Indian Institute of Management (IIM) Indore

Campus Finalist, Salesforce Case Competition
Indian Institute of Management (IIM) Indore

OnePlus Campus Ambassador
Indian Institute of Management (IIM) Indore

Cofounder, Zaryan (NGO)
Punjab, India