

Power Automate for Actuaries:

From Manual Processes to Automated Workflows

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Agenda

01

Why actuaries should care

02

How Power Automate works

03

Demo & use cases

04

Getting started

Reality today vs the future...



1

Chased someone for an overdue task?



2

Manually copied information from one Excel file to another?



3

Forgotten to set a reminder for yourself?



4

Waited until the monthly due date before realising something was missing?

Imagine This Workflow Running Automatically

Scenario: A portfolio monitoring process identifies an exception that requires investigation.

Today, manually:



Manually run monitoring and investigate results



Identify issues and notify stakeholders



Track and follow up until closure

With automation:



A monitoring process identifies that the loss ratio of a portfolio segment exceeds a threshold...



Creates and assigns an investigation tasks automatically



A notification is sent to the Teams channel, and escalates further if not addressed within X days.

Automation coordinates the process, while actuaries focus on analysing the issue.

What is Power Automate?

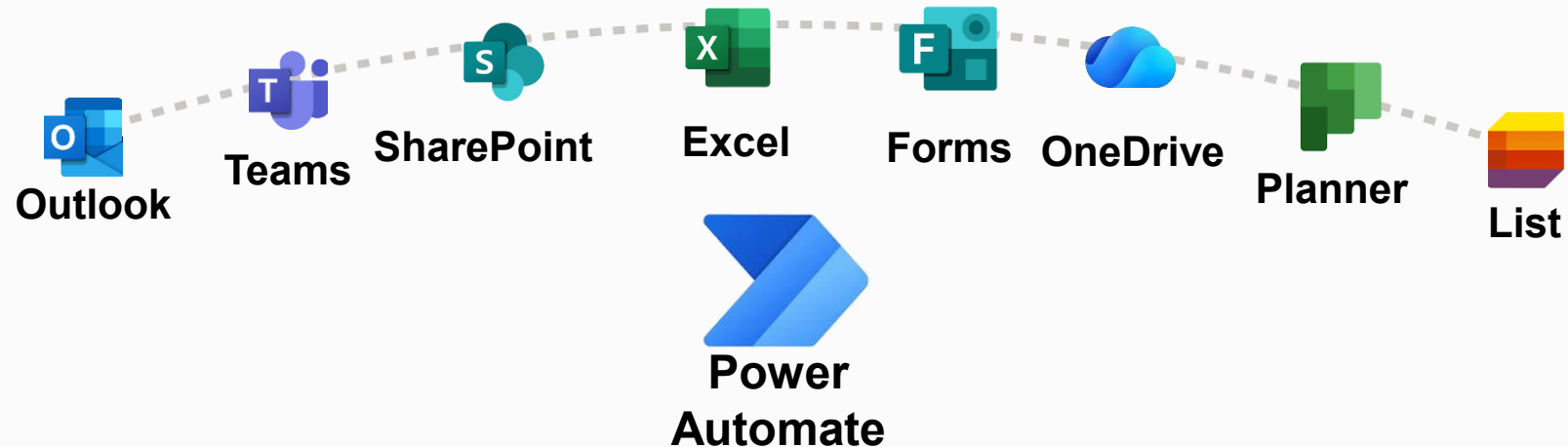
Excel VBA

VBA automates work **inside** Excel.

Power Automate

“VBA” for Microsoft 365.

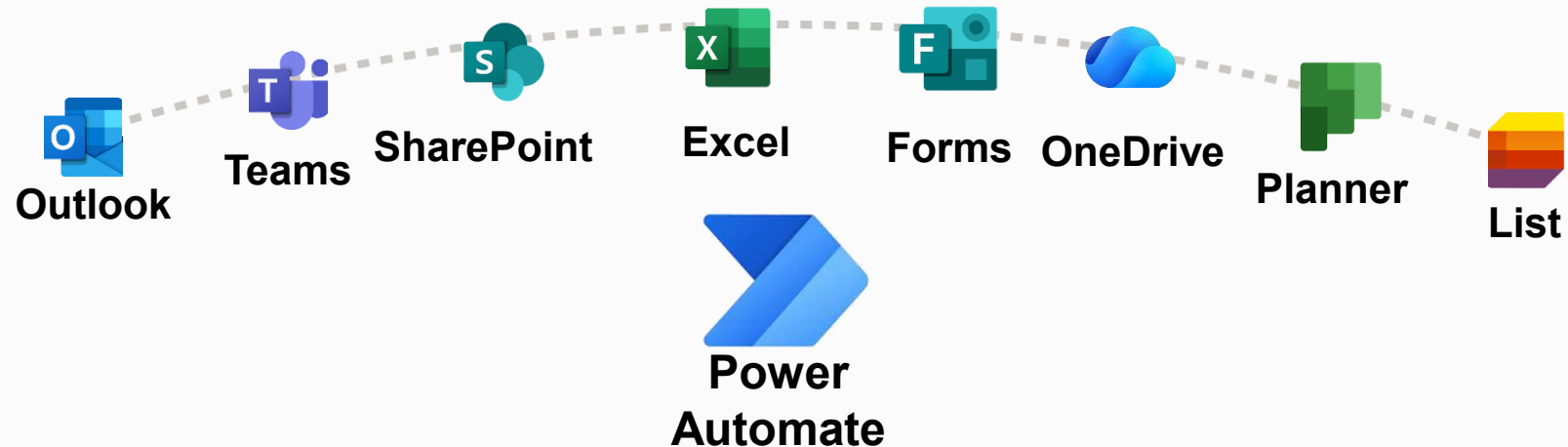
Build the logic once — orchestrate across the Microsoft ecosystem automatically.



Reason 1:

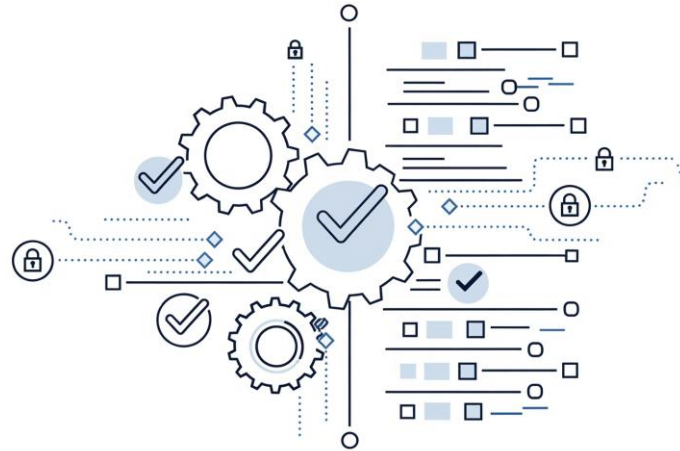
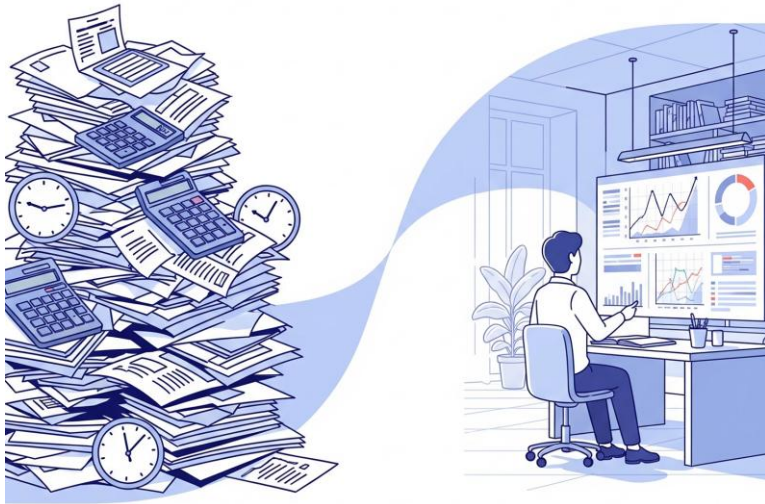
Most Actuarial Work Already Lives in Microsoft 365

Build the logic once — orchestrate across the Microsoft ecosystem automatically.



Reason 2:

Automation frees up actuarial capacity with auditable processes



Reason 3:

Future-proofing with Copilot & Power Automate

COPILOT

The brain



Assist actuaries to decide what should happen.

POWER AUTOMATE

The hands



Reliably carries it out.

Learning Power Automate is the natural stepping stone to Copilot Studio — the orchestration concepts are the same.

1

Trigger

The event that starts the flow

2

Logic / actions

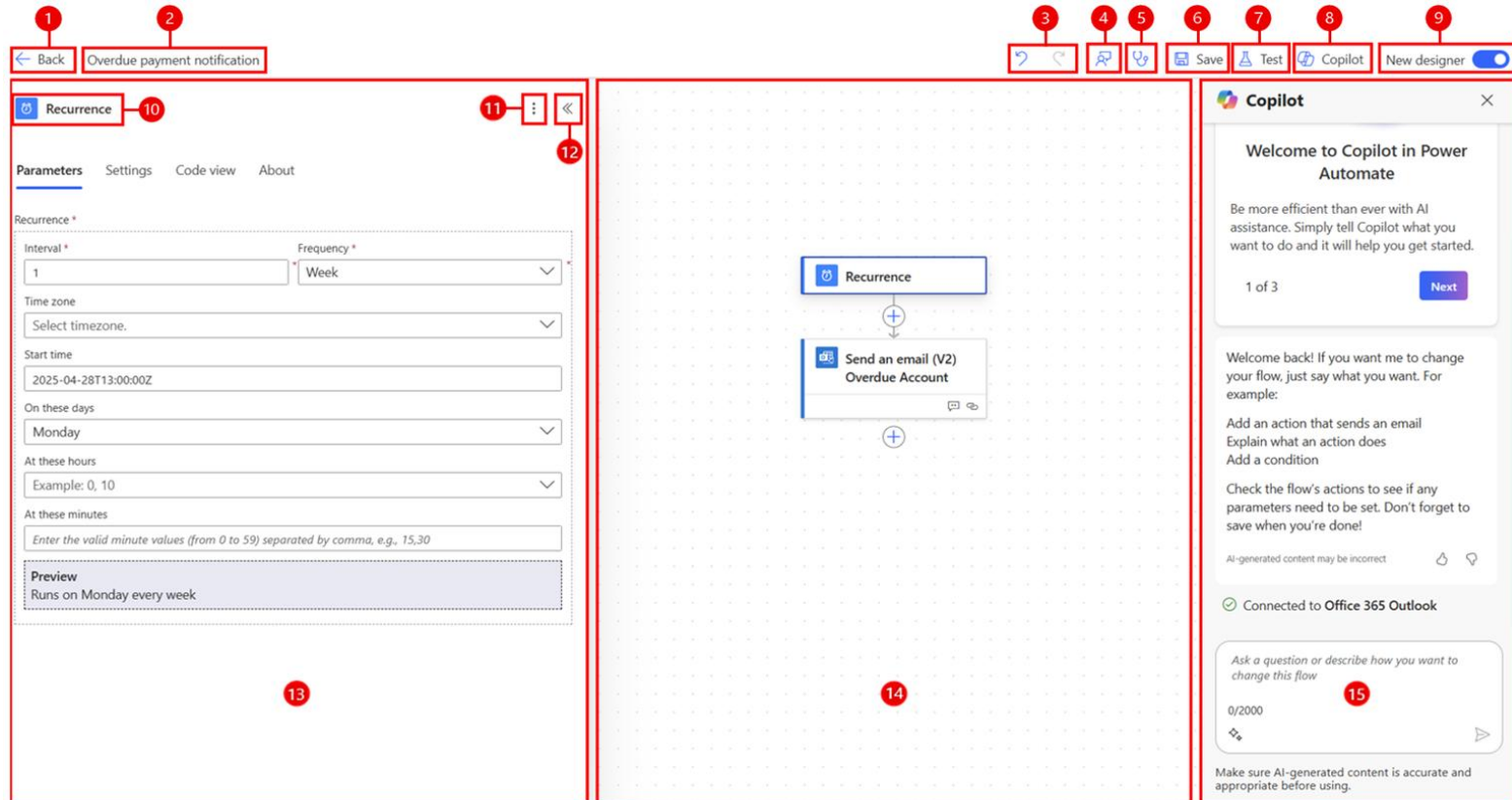
What the flow does automatically

3

Outcome

The final result or output

Power Automate Cloud Flow Designer interface



The screenshot shows the Power Automate Cloud Flow Designer interface. The top navigation bar includes a 'Back' button (1), the flow name 'Overdue payment notification' (2), and a toolbar with icons for help (3), undo (4), redo (5), save (6), test (7), Copilot (8), and a 'New designer' toggle (9). The main workspace is divided into two panes. The left pane (10) shows the 'Recurrence' trigger configuration, including fields for Interval (1), Frequency (2), Time zone (3), Start time (4), On these days (5), At these hours (6), and At these minutes (7). A 'Preview' section (13) shows the flow running on Monday every week. The right pane (14) shows the flow canvas with a 'Recurrence' trigger (10) and a 'Send an email (V2) Overdue Account' action (11). The right sidebar (15) contains the 'Copilot' panel with a welcome message, instructions on how to use Copilot, and a text input field for asking questions or describing flow changes.

Source: learn.microsoft.com/power-automate/flows-designer

Data Analysis
Pipeline

	A	B	C	D	E
1	Segment	Metric	CurrentValue	Threshold	Trigger
2	Electronic Vehicles	Loss Ratio	78.0	72.0	Yes
3	Young Driver	Frequency	8.2	7.5	Yes
4	Standard Private Car	GWP Growth	1.2		

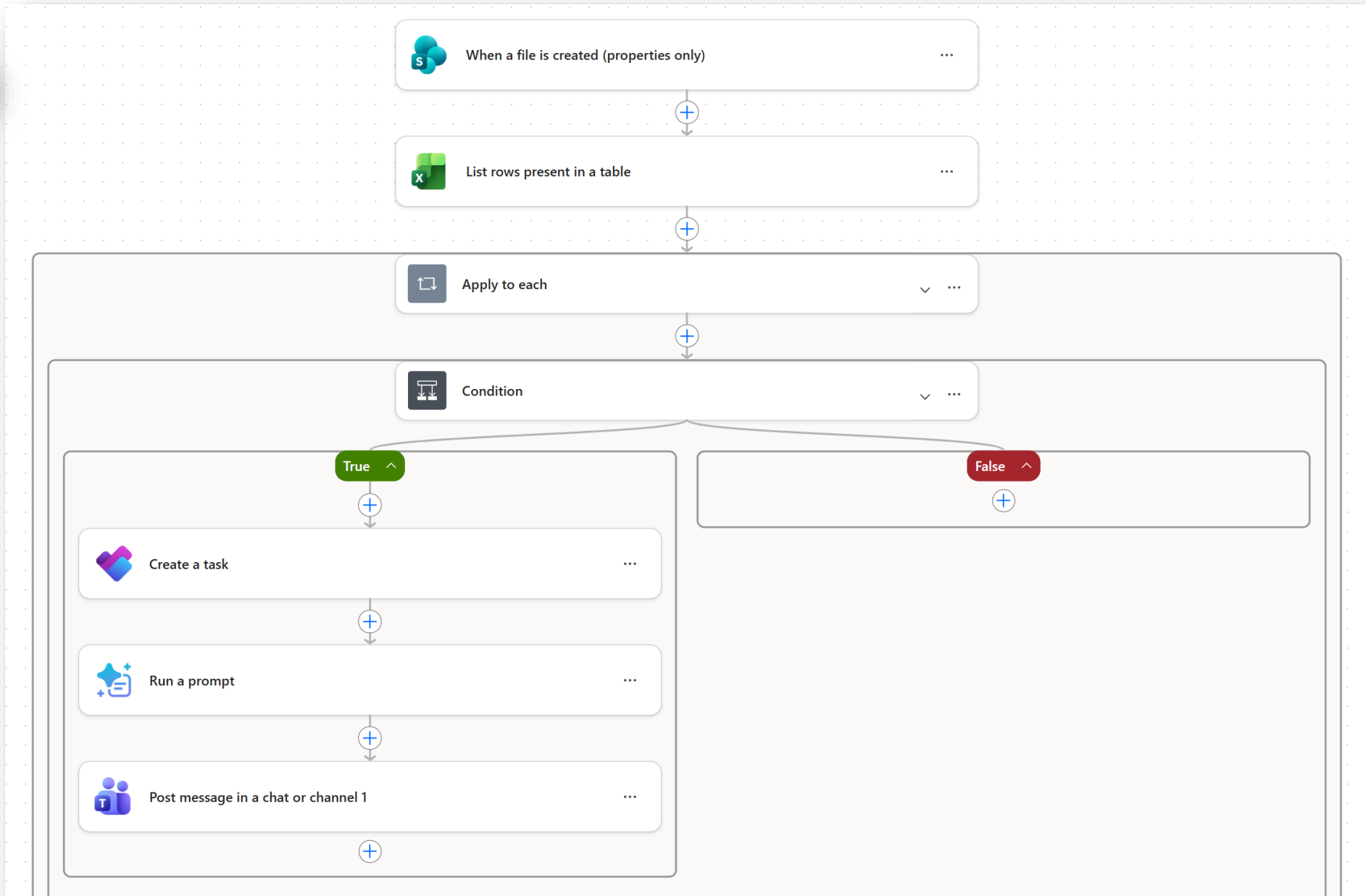


Documents > General > PowerAutomate ▾

≡ All Documents + Add view

📄	Name ▾	Modified ⓘ ▾
📄	202607_data.xlsx	About a minute...
📄	202608_data.xlsx	A few seconds a...

Demo (Step 2 out of 4)





 My plans >  **Portfolio monitoring**  ...

 Grid

 **Board**

 Calendar

 Charts

To do

+ Add task

☐

Monitoring flagged:Young Driver

 08/30

☐

Monitoring flagged:Electronic Vehicles

 08/30

In Progress

+ Add task

 Completed tasks

1

Completed

+ Add task

 Completed tasks

1



Workflows 7:58 PM



Alert: The Loss Ratio for the Electronic Vehicles segment has breached the threshold by 6 points, with a current value of 78 against a threshold of 72. A Planner follow-up task has been created to address this issue.

Alert: The Young Driver segment has breached the Frequency metric threshold, with an actual value of 8.2 exceeding the threshold of 7.5. A Planner follow-up task has been created to address this issue.

Type a message



Scenario: you need to collate quarterly inputs from multiple departments to complete a report.

1

Trigger

The event that starts the flow



Maintain a tracker with the list of respondents and their email. On the 1st day of each quarter, a Cloud flow runs automatically...

2

Logic / actions

What the flow does automatically



Emails go out to all respondents with a template. When respondents reply, the tracker is updated automatically...

3

Outcome

The final result or output



Reminder and escalation emails are sent out within X days of the due date.

Scenario: you need to keep an audit trail of task completion

1

Trigger

The event that starts the flow



When a team member completes work and marks the status as completed in Planner...

2

Logic / actions

What the flow does automatically



An approval process is triggered to the supervisor. The supervisor reviews the work and approves it...

3

Outcome

The final result or output



The approval outcome and reviewer comments are written to a central review log for auditability.

Three steps to your first flow

1

Pick one repetitive task

Small and annoying beats large and important.
Something you do weekly.

2

Ask Copilot to draft the flow

Describe it in plain English.
You no longer start from a blank screen.

3

Make it work, then improve gradually

Ugly is fine — working is the only requirement.
Then refine error handling and edge cases.

Quick wins build confidence. Confidence is what makes the second flow happen.



Power Automate

Handles the predictable: triggers, routing, filing, reminders, records.

AI

Handles the unstructured: language, summarising, classifying, drafting.

Human Actuaries

Involved in the loop to validate results before giving the green light

Don't automate actuarial judgement. Automate the coordination around actuarial work.

Thank you!
