

— CUSTOMER STORY

The certificate that took down the claims portal was the last one.

Expired, again

Every few months, a certificate nobody was tracking expired and something customer-facing stopped working. The fix took ten minutes. Finding out what had broken took the rest of the morning.

The situation — A calendar reminder as the control

The insurer had hundreds of certificates across internal and customer-facing services. Renewal depended on memory:

- Expiry dates lived in a spreadsheet that was accurate the day it was made.
- Renewal was manual and spread across three teams with different tooling.
- A claims-portal outage from an expired cert had already reached the press once.
- Nobody wanted fully unattended renewal on customer-facing services.

The move — An agentic workflow with a confidence branch

The team ran the prebuilt Cert Renewal agentic workflow: it finds certificates expiring within 60 days, ranks them by blast radius, renews and validates the ones it is confident about, and escalates the rest to a person.

"We didn't want a robot renewing the claims portal at 2am on a guess. We wanted it to handle the easy ninety percent and put the tricky ones in front of us with the evidence."

— DIRECTOR OF INFRASTRUCTURE SECURITY

— DEPLOYMENT SNAPSHOT

SECTOR

General insurance

ESTATE

Internal and customer-facing services

START POINT

Prebuilt Cert Renewal · Prod

TYPE

Agentic workflow

TRIGGER

Daily schedule

BRANCH

Renew above confidence threshold, else escalate

APPROVAL

Required on customer-facing tags

INTEGRATIONS

Cloud load balancers, ServiceNow, Slack

— BUILT ON

3

AUTOMATION
TYPES

10

BLOCK FAMILIES

1-click

RUN ON ANY
SITE

- **Fork, don't start blank.** Most of the work already exists in the library — change what is different.
- **Pick the right machinery.** Fixed steps, reasoning inside rails, or a standing agent — matched to the job.

— HOW IT WAS BUILT

Run

Started with the prebuilt automation as-is on a non-production site.

Threshold

Set a confidence level below which it escalates instead of renewing.

Gate

Customer-facing certificates always require approval, whatever the confidence.

Report

Every run posts what changed to the platform channel and the ticket.

— WHAT CHANGED

BEFORE WORKFLOW DESIGNER

- Expiry tracked in a stale spreadsheet
- Manual renewal across three teams
- Outages discovered by customers
- All-or-nothing debates about automation
- Mornings lost to finding what broke

WITH WORKFLOW DESIGNER

- Expiring certs found daily, 60 days ahead
- Routine renewals handled end to end
- Customer-facing renewals approved with evidence
- A confidence branch instead of a debate
- A record of every change, posted automatically

— WHERE THE CHANGE CAME FROM

The branch settled the argument

Escalating below a threshold gave the cautious and the impatient what they each wanted.

Prebuilt meant fast

The automation worked on day one; the team only tuned the threshold and the gate.

Reporting built trust

Seeing exactly what changed after every run made widening its scope easy.

— WHY THIS MATTERS IN INSURANCE

Agentic workflow

Confidence branching

Approval flow control

Schedule trigger

Prebuilt library

Output to Slack & tickets

Success-rate tracking

Cross-platform

— BOTTOM LINE

Workflow Designer replaced a spreadsheet and a calendar reminder with an automation that renews what it is sure of and asks about the rest.

3 AUTOMATION TYPES**10** BLOCK FAMILIES**1-click** RUN ON ANY SITE

Customer anonymised at their request; profile and quotation are representative of a deployment in this sector, not a named engagement. Outcomes are illustrative of the operating changes Workflow Designer enables, not measured benchmarks. © 2026–2027 LumiOps.AI.

**Stop rewriting the same
runbook.**

Fork a prebuilt automation, point it at your site,
and run it today.

GET IN TOUCH

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RUN

[1-click, any site](#)

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