

AI-Powered Intelligence:

Redefining Enterprise Analytics for the Next Era

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G-STAT
(1999-2006)



Travelers
(2006-2012)



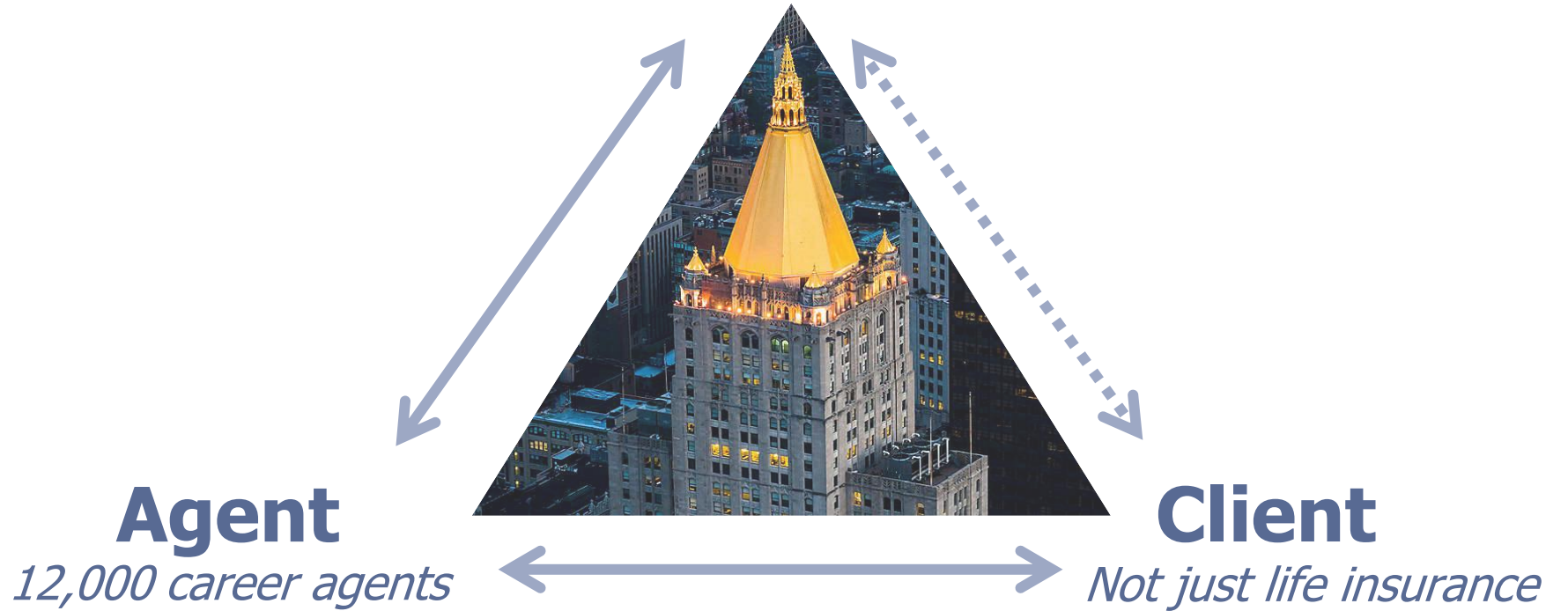
AIG
(2012-2019)



New York Life
(2019-Present)

B2B2C in Insurance: Driving Client Engagement through Career Agents

New York Life *Has been around since 1845*



AI-Powered Modernization

Investing \$1B+ in AI, data and technology delivering protection-first holistic advice through seamless digital experiences

Building AI at Every Level: Access for All, Solutions that Scale

Individual productivity to enterprise transformation: a maturity journey that scales

EMPOWER

Productivity for all
Local AI tools

Examples:

- Meeting summaries
- Document search
- Smart templates



Quick Wins

Distributed R&D

ELEVATE

Targeted solutions
Business outcomes

Examples:

- Customer cross-sell
- Smart underwriting
- Proactive fraud detection



Strategic

Focused impact

REINVENT

Agentic workflows
Multiple domains

Examples:

- Autonomous servicing
- Proactive client management
- Multi-agent systems



Transform

Enterprise scale

Service Sage: Service Rep Knowledge Management



Elevate-tier solution: Custom RAG for enterprise accuracy and scale



Pain Points

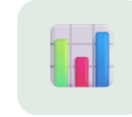
- 12 to 18 months for new CSRs to be proficient
- Documentation hard to locate and long
- Over 1500 reference documents
- Callers get different answers for same issue



Solution

RAG-based chatbot retrieving from NYL-specific documents, solving what off-the-shelf LLMs cannot: lack of domain knowledge, enterprise accuracy, and scale requirements.

- ✓ **Instant Knowledge Access**
- ✓ **Learning from Interactions**
- ✓ **Supporting CSRs & Clients**



Results

19% reduction in call hold time

5% reduction in overall call handle time

15% reduction in handle time for newer CSRs

1500+ active users

AI Path to Product: from Service Sage to Enterprise Sage



Reusable platform architecture: deploy in weeks, not months

Reusable Architecture

**Use-case specific
UI/UX • Doc Corpus**

Reusable Core
Sage AI Engine • RAG • Data
Connectors

Shared Foundation
MLOps Platform • API Layer

Evolution & Scale

Service Sage



Enterprise Sage



Contact Center

UW

Finance

Product

... and others

From Knowledge Management to Enterprise Intelligence



We're moving from *"finding answers"* to *"recommending actions"*



Knowledge Access

Service Sage → cuts hold time by 19%



Knowledge Scale

Enterprise Sage → across 4+ domains



Decision Intelligence

Real-time insights → driving action

Enterprise AI Tools: Democratized Access



Empower foundation - productivity for all, innovation for many

EMPOWERING 12,000+ EMPLOYEES

AI Assistants

ChatGPT Enterprise

Enterprise deployment spanning across business units

Custom GPTs

Employee-built assistants across all departments

Productivity Suite

Microsoft Copilot

Integrated across the enterprise—augmenting every employee's daily workflow.

Copilot Agents

Automated workflows and intelligent task management

EXPLORING NEXT-GEN CAPABILITIES

Data Analysis & Finance

Anthropic Claude

POC for advanced financial analysis and complex data analysis

Developer Tools

GitHub Copilot

AI pair programming for faster, more efficient code development

Cursor

AI-native development environment for advanced coding workflows

Building an AI-First Culture: Mindset & Skillset



Tools alone don't transform - investing in people, culture, and capability



Enterprise-wide initiative to build the mindset, skillset and toolset to thrive in an AI-enabled world

AI in Action Day

Hundreds of submissions
Finalists showcase
Real business impact demos

AI Literacy Training

100% employee coverage goal
Partnership with NYU Stern
Mandatory AI goals in reviews

Hands-On Workshop

Custom GPT building
Prompt engineering
Department-specific use cases

AI Champions Network

Embedded experts in each unit
Peer-to-peer learning
Best practice sharing



NYL Hack 2024 Success

- AI for Sustainability & Philanthropy
- Build-a-GPT Challenge
- NYL Investments Innovation

"It's not just about building tools and throwing them over a wall. It's about having a data-driven culture and making the company AI-ready." - *Don Vu, Chief Data & Analytics Officer*

Responsible AI at New York Life: Principles in Practice

Enterprise standards for every AI project



Accountability



Governance



**Fairness and
Inclusion**



**Privacy and
Data Security**



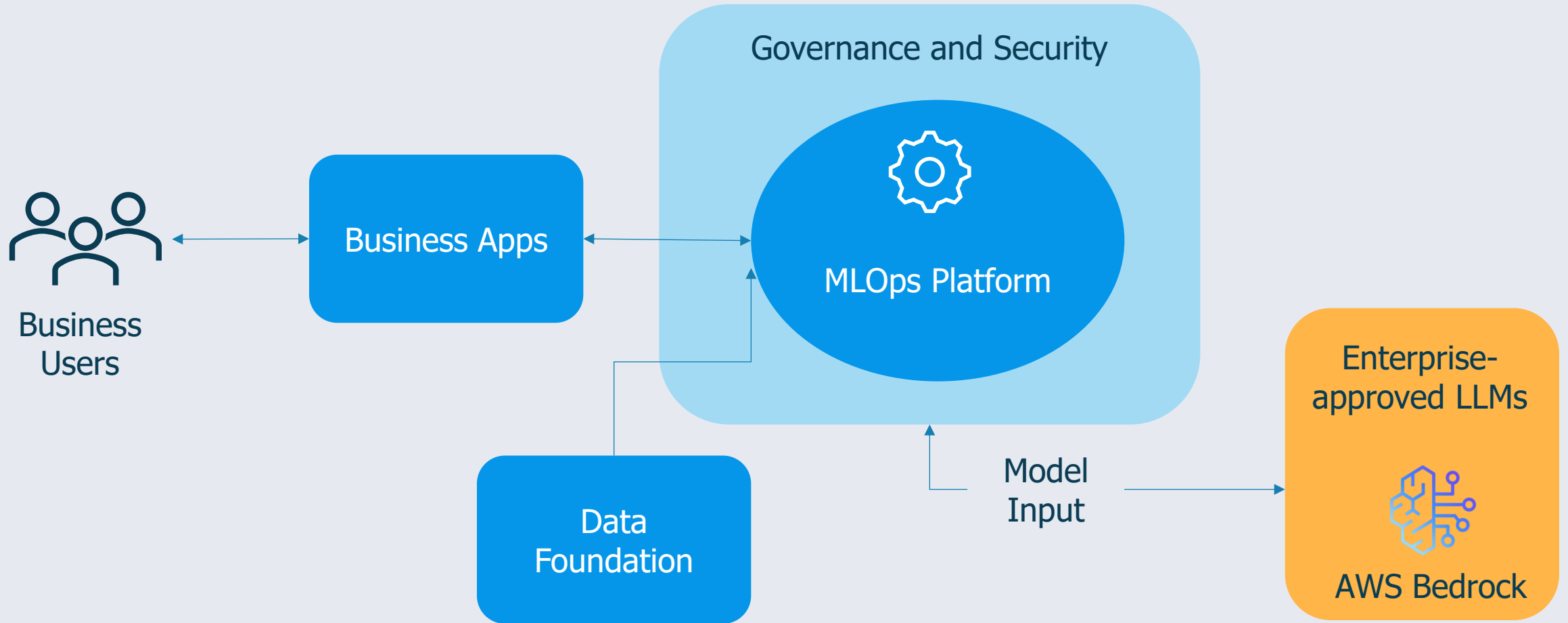
**Reliability and
Robustness**



Transparency

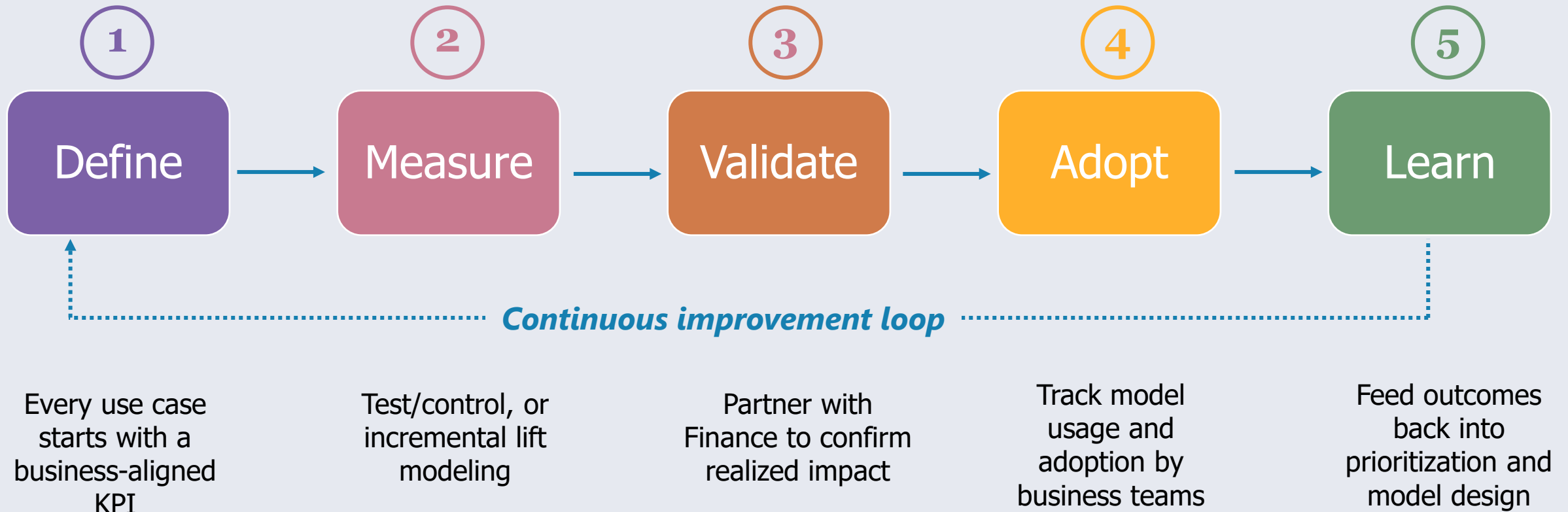
From Data to Decisions: Secure AI at Scale

Infrastructure that operationalizes responsible AI principles in practice



Quantifying ROI from AI

Turning analytics innovation into measurable business value

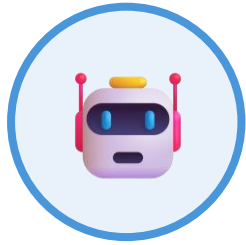


Agents That Work Together - and With Us



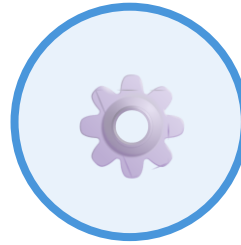
REINVENT

Building governed, goal-driven AI ecosystems that augment human expertise



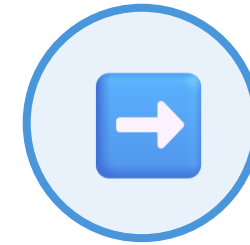
Autonomous Agents

From copilots to goal-oriented agents that plan, act, and learn.



Orchestration and Governance

Policy, identity, human-in-the-loop, observability—built in.



Lighthouse → Scale

Select 1–2 workflows, prove value, expand via agent mesh.

Questions?

