

Simahi Opens 2026 With a Focus on Advisor Automation, P&C Integration Readiness, and Better Partner Documentation

Ontario insurtech Simahi shares 2026 roadmap focused on advisor automation, P&C integration readiness, and partner documentation for faster onboarding.

MISSISSAUGA, ON, CANADA, January 6, 2026 /EINPresswire.com/ -- Dot H Digital Inc., the company behind Simahi, an all-in-one CRM and workflow platform for independent insurance advisors, today shared its 2026 product direction focused on deeper workflow automation, P&C (Property & Casualty) integration readiness, and improved documentation to support faster onboarding and partner implementation.



Simahi - Agent Hub, Complete Digital Solution for Insurance Agents

Insurance advisors and broker teams often rely on multiple disconnected tools to manage leads, quotes, policies, renewals, tasks, and client communication. This fragmentation can create avoidable manual work, inconsistent follow-ups, and limited visibility into what needs attention next—especially during high-volume quoting periods and renewal seasons. Simahi is designed to unify core workflows in one organized system, helping teams stay consistent, reduce repetitive admin tasks, and maintain clearer records.

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In 2026, we’re focused on practical automation—renewals, follow-ups, and compliance-friendly documentation—so advisors spend less time on admin and more time with clients.”

Manish Jetly

“Insurance professionals shouldn’t have to spend their best hours chasing renewals, rebuilding the same documents, or tracking follow-ups across spreadsheets and inboxes,”

said Manish Jetly, Founder of Dot H Digital Inc. “In 2026, our focus is simple: make everyday advisor workflows faster, clearer, and more reliable—so teams can spend more time serving

clients and growing their book.”

Why This Matters in 2026

As consumer expectations rise and response time becomes a competitive advantage, broker teams are expected to deliver quick quotes, clear documentation, and consistent follow-up—without increasing operational overhead. At the same time, compliance expectations and recordkeeping requirements continue to require structure and consistency. Simahi’s 2026 roadmap is designed to support the realities of modern distribution: speed, accuracy, and repeatable processes.

Simahi serves advisors working across product lines such as visitor and super visa insurance, travel insurance, life insurance, and critical illness, where volume, pace, and follow-up discipline matter. The platform is built to help teams standardize operations without adding complexity.

2026 Roadmap: Practical Outcomes Across the Advisor Lifecycle

Simahi’s 2026 priorities focus on improvements that directly impact daily productivity—reducing back-and-forth, keeping tasks and deadlines visible, strengthening workflow consistency, and making it easier for teams to onboard and implement a repeatable operating process.

1) Renewal & Policy Automation

Simahi will continue enhancing renewal and policy lifecycle workflows with stronger timelines, structured reminders, and clearer task visibility. The goal is to help reduce missed renewals, improve retention workflows, and give teams a clearer view of what requires attention across upcoming expiries. Enhancements will also support more consistent client touchpoints and better day-to-day servicing routines.

2) Quote-to-Client Workflow Improvements

Simahi plans to strengthen the quote journey—from preparation and sharing to follow-up tracking—so advisors can reduce manual steps and deliver a more organized client experience. This includes workflow support for common quoting realities: multiple client options, time-sensitive follow-ups, and clean documentation of what was sent and when. The objective is to help teams respond faster while keeping records structured for future servicing.

3) Client Onboarding & Forms

Simahi will expand onboarding and intake workflow capabilities to help teams capture the right information early, keep client records structured, and improve readiness for servicing. The roadmap includes improvements aimed at reducing repetitive data entry and making it easier to standardize how information is collected across the team—supporting smoother handoffs, clearer next steps, and more consistent client experiences.

4) Compliance-Friendly Operations

Simahi will continue building workflow structures that support organized recordkeeping, consistent documentation, and audit-friendly tracking. The focus is on practical tools that encourage repeatable processes—such as templated communications and structured logs—without forcing teams into complicated systems. These enhancements are intended to help advisors maintain clean records while operating efficiently.

5) P&C Integration Readiness

In 2026, Simahi aims to broaden platform readiness for P&C workflows and integration opportunities. Many broker teams operate across multiple product lines, and they increasingly seek connected operations and a unified view of client activity. Simahi's direction includes preparing the platform to better support P&C-related workflow needs and integration pathways, helping teams build more connected processes as they scale.

6) Documentation & Partner Enablement

Alongside product enhancements, Simahi intends to invest in clearer documentation and implementation resources to help broker teams, partners, and integrators onboard faster, configure workflows consistently, and deploy standardized processes with confidence. This includes improving how capabilities are explained, how workflows are recommended, and how best practices are shared—helping reduce friction during implementation and supporting a smoother rollout across teams.

“We’re also laying the groundwork for P&C integration and improving how we share documentation so partners and broker teams can implement best-practice workflows with confidence,” added Jetly.

Built for Teams That Want to Scale Without More Admin

Simahi is designed for independent advisors and small broker teams who want to grow without piling on spreadsheets, manual reminders, and disconnected systems. By unifying workflow automation with structured client records, Simahi helps teams operate with greater consistency—especially in environments where response time and follow-up discipline directly impact outcomes.

Typical day-to-day workflows supported by Simahi include organizing leads and clients, managing quoting workflows, tracking policies and renewals, scheduling reminders and tasks, and keeping communication records structured for servicing. The 2026 roadmap builds on these foundations to further improve clarity, speed, and repeatability across the advisor lifecycle.

Availability

Simahi is available to independent advisors and broker teams in Ontario and across Canada. To learn more, request a product overview, or explore a demo, visit simahi.com.

About Dot H Digital Inc.

Dot H Digital Inc. is a Canada-based software company building Simahi, an insurtech platform designed to modernize how independent insurance advisors manage leads, clients, quotes, policies, renewals, and day-to-day operations. Simahi helps teams reduce administrative workload, improve follow-up consistency, and maintain organized, compliance-friendly records through workflow automation and structured processes.

Manish Jetly

Dot H Digital Inc

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