

fortix® | Smarter Together.

Your Technology Partner for Smarter AI Workflows.

Tech & Software for Insurance Brokers
& Industry Professionals.

Who We Are

Fully Australian Owned and Locally Based.

For more than two decades, we've partnered with businesses to strengthen performance, streamline operations and unlock sustainable growth.

Our journey has been shaped by close collaboration with our clients, working side-by-side to understand their challenges, refine their systems and build solutions that deliver measurable, lasting outcomes.

Our team of exceptional engineers have been central to this progress. Together, we have pioneered CRM solutions that have transformed business operations across the insurance sector and related industries, empowering brokers, advisers and service teams to manage complexity with confidence.

With a specialised focus in insurance and an ongoing commitment to continuous improvement, we have led the way in refining custom AI workflows that support scalable growth, operational efficiency and stronger client service. These solutions have contributed directly to the success and expansion of many of our clients.



KD Joaquin, Client Services & Operations at Fortix

What We Do

Smarter Systems Built for Performance.

We believe technology should feel like support — not complexity.

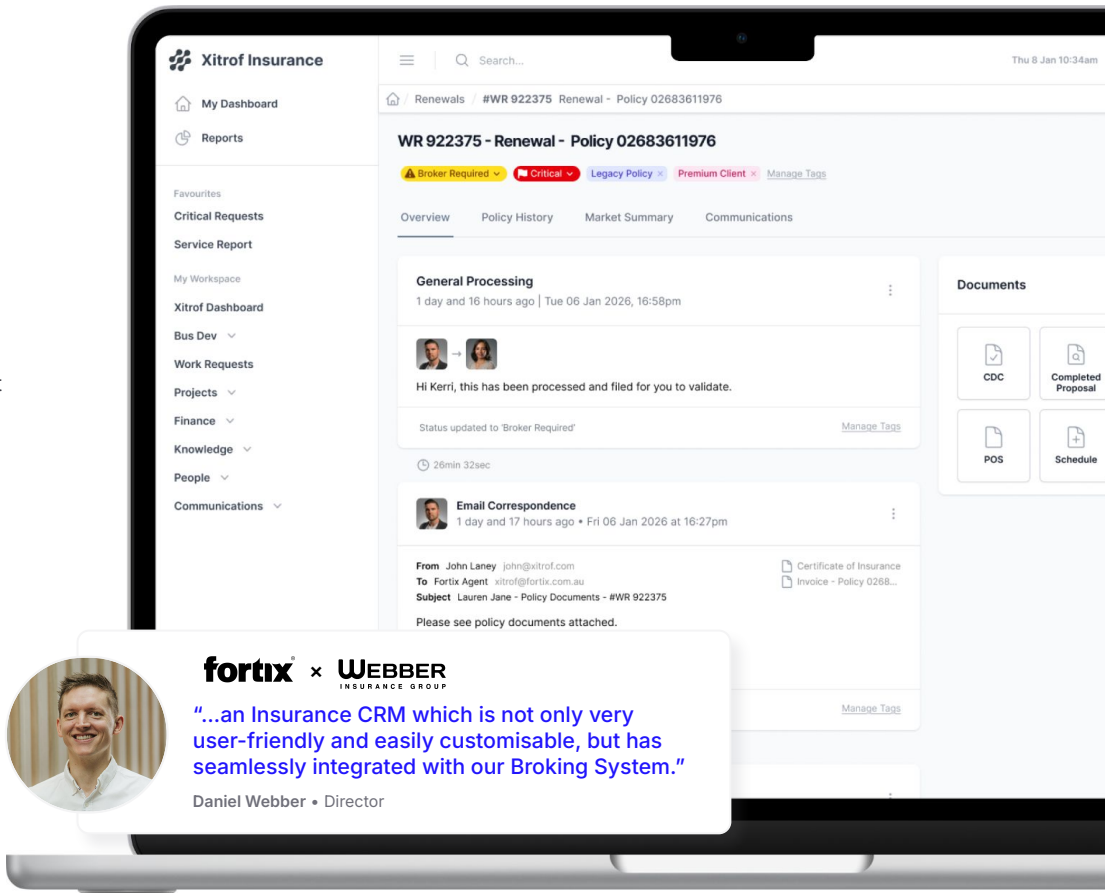
We work alongside brokers, industry professionals and organisations to create operational environments that are consistent, compliant, efficient and genuinely helpful for your team and your clients.

Our technology platform sits at the centre of your business, but it is our strength in human relationships and our commitment to service, and a lasting partnership with you that unlocks the transformation that we promise our clients. We listen, configure, automate, and evolve your workflows so that your team can focus on growing your business.

We pioneer CRM systems and software solutions that reshape how insurance brokers, service-based businesses and professional organisations operate, communicate and grow.

Book a FREE discovery call

Find a time that suits you





Martin Suchenak, Business Leader of Technology at Fortix

Why Work With Us

The challenges in the insurance world are often technical and operational.

Double handling, inconsistent processes, manual follow-ups, compliance tracking, and the constant pressure of renewals or claims touchpoints make scaling difficult and stressful.

Fortix has already helped many firms and businesses remove these friction points, and help teams operate with clarity, confidence and consistency...



WEBBER
INSURANCE GROUP



INTERLINK
INSURANCE BROKERS

THRISK
CORPORATE ADVISORS
INSURANCE BROKERS

omnisure
INSURANCE BROKERS

...and more.

"Fortix has saved the business over 50 hours a month in processing time from one activity alone..."



Kristofer Wright
Claims & Compliance Manager



Replace manual processes with predictable, automated workflows.

Save time by letting technology handle policy renewals, reminders, and follow-ups automatically.



Empower teams with structured tasks, templates and communication pathways.

Manage work efficiently and automate the filing of all correspondence, reducing manual admin work.



Create compliance visibility across the entire client lifecycle.

Utilise real-time dashboards and auditable evidence trails to proactively identify risks and ensure full security over your operations.



Grow without increasing administrative load.

Boost your team's cognitive capacity by automating "busy work," allowing you to scale and focus on high-value client relationships.



Capture data once and use it everywhere.

Eliminate data silos by automatically pulling client and policy information into templates and workflows, ensuring data consistency across your entire business.



Integrate marketing, web forms, pipelines and support teams.

Link your online schemes and lead capture tools directly to your broking platform for a unified workflow and seamless data exchange.

Our Process

Meeting your needs, fueling your growth.

By deeply understanding your unique business processes and team dynamics, we meet you where you are and help you establish a clear, efficient operating rhythm built for a successful, long-term partnership.

01

Discover

We begin with a free, non-committal discovery to understand your current environment.

This may include:

- Your business structure
- Broker platform setup
- Team roles and workload pressures
- Renewal and claims rhythms
- Compliance requirements
- Digital forms, marketing tools, and data flows

02

Configure & Design

Workflows are configured and tailored within Fortix to reflect how your team actually works.

This may include:

- Workflow design for renewals, claims, sales and service
- Document templates and communication pathways
- Data mapping and imports
- Event-based task structures for onshore/offshore teams
- Integration with marketing systems and websites
- Pre-filled forms and engagement sequences
- Compliance checkpoints and audit records

03

Deliver

We implement the full operating environment with training and documentation so your team feels confident and supported.

This may include:

- Live workflow rollout
- Dashboards and alerts
- Automations and follow-ups
- Template libraries
- Reporting and insights
- Team training
- Optional API exploration with broker systems (where applicable)

04

Evolve

As your business changes over time with new products, teams, and processes, your Fortix environment evolves with you.

This may include:

- Quarterly reviews
- Workflow refinements
- New automations
- Access to new features
- Early adoption opportunities for our innovation roadmap
- AR innovations

Let's Connect

Together, we can build the systems and operating environment your team deserves.

Book a discovery call with our team and we'll walk through your goals, your current environment, and where Fortix can create clarity and efficiency for you.

We are always searching for collaboration opportunities with third-party companies offering AI driven tools, insurance and product knowledge, compliance, and others to further drive value to our clients.

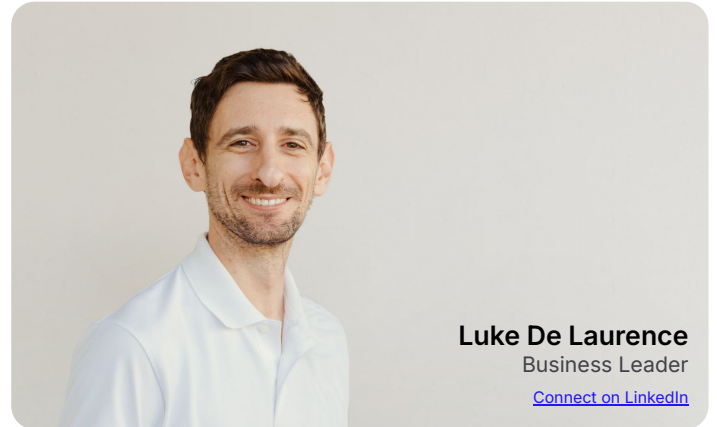
Call 1300 426 311
Email sales@fortix.com

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Find a time that suits you



Paul Faix
Founder & CEO
[Connect on LinkedIn](#)



Luke De Laurence
Business Leader
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fortix[®]

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Best
Technology



Best Commerce &
Industry Based
Business



AMP
Innovation



Quality
Customer Service



Best Service
Based Business

