



Reimagining Policy Administration and CRM for Seamless DBA & Longshore Benefits

Objective

A leading Self-Insured Workers' Compensation provider in US was struggling with scattered data, spread across multiple systems. They were looking to unify data for efficient business workflows and thus reached out to us.

Services

- Advisory
- Implementation

Challenges

Our client's insurance members, policies and claim data were dispersed across multiple systems. They did not have process automation for longshore businesses, renewals, rewriting, renewal IPE and payroll processing. Their lack of documentation (requirement, design, architecture, and others) frequently resulted in process gaps, barring solution modification.

Their Insurance Underwriters and MSRs were not utilizing Salesforce, which led to several data integrity issues. The Salesforce environment was out-of-sync with no baseline code available and their practices in Mule implementation were subpar. They lacked appropriate talent pool in their customer support team which resulted in delayed transition.

Tech Stack

- ▶ **Salesforce FSC**
- ▶ **Experience Cloud**
- ▶ **MuleSoft**

How Exavalu Made an Impact

Our team discovered and identified process gaps, performance bottlenecks, technical constraints and designed a unified data model for member and policy data. From developing key artifacts like requirement, design and architecture documents to implementing Azure Service Bus Message Queue for reliable transaction execution, we minimized errors and maintained data consistency at every stage.

What appeared absolutely challenging - out-of-sync Salesforce environments - we turned it around in just no time! By creating deployment strategies and establishing a baseline code version. Our end-to-end Salesforce implementation for both the products DBA and Longshore ensured payroll management, endorsement management, and automation of quoting, binding, policy generation, invoicing. We leveraged implementation best practices to reduce TAT for new and partially implemented features.

We ensured a balanced resource pool which included Salesforce Technical, Functional Experts, and MuleSoft Consultants with solid experience across insurance value chain.

Benefits

- Streamlined underwriting process enhanced payroll management, quoting, binding, invoicing and endorsement
- Faster transition to the new system enabled easy notifications
- Efficient tracking of agent interactions led to faster assistance
- Preemptive and quick issue resolution
- Faster future rollouts
- Improved data governance resulted in enhanced data quality

Key Highlights

- Reduction in underwriting and processing time
- Faster transition to new system
- Improvement in data accuracy and governance

