

Success Story

Achieving Enriched Customer Engagement with



Agentforce and DataCloud

Introduction

A leading personal lines insurance company wanted to significantly improve customer engagement for its First Notice of Loss, Policy Endorsements and Upselling processes with autonomous agents. They approached Exavalu for assistance.

The Challenge

Our client persistently struggled with fragmented data. This led to inefficiencies in accessing critical information, such as policy details and client interactions, resulting in slower response times and lower service quality. Data inconsistency and the lack of real-time visibility added another layer of complexity in streamlining their business operations.

Their agents frequently toggled between their CRM and policy admin systems, resulting in a disjointed and complicated experience. Their system often relied on live customer service representatives, which led to further delays and inefficiencies. During peak periods, high call volumes strained resources, resulting in slower response times.

Manual data entry increased the risk of inaccuracies, complicating claim resolution. Above all, the lack of personalization and empathy in traditional processes often made customers feel undervalued. It was high time to embrace a solution that addressed each of these issues seamlessly.



The Exavalu Difference

We adopted a collaborative and progressive approach to help our client improve their customer service. We:

- Built Digital Insurance Agents using Agentforce to autonomously interact with customers, perform necessary actions and provide information based on their specific needs.
- Integrated Data Cloud as a unified platform for collecting, processing, storing, and analyzing data from various channels and data sources.
- Established defined actions by leveraging Salesforce Flows for process automation and custom-built logic through Apex for digital agents to perform autonomously.
- Enabled digital agents to exchange information with third party systems through MuleSoft integration.

The Results and Benefits

By integrating Agentforce and Data Cloud into their business processes, our client achieved transformational results including:

- A unified platform for agents to access client information, policy details, and communication history, all from one window.
- Efficient workflow execution and higher productivity through faster data search.
- Personalized services due to real-time data insights.
- Faster claim processing and timely communication, resulting in enhanced customer satisfaction.
- Automation of repetitive and routine admin tasks, allowing agents to focus on high-value activities.
- Data-driven decision with the help of AI/ML and Data Cloud.

