



CUSTOMER STORIES /



Modernizing CX insures a healthy future

AIA New Zealand Limited is on a mission is to help make New Zealand one of the healthiest and best protected nations globally. Hindered by legacy technology, the life and health insurer migrated to AI-powered CX Cloud from Genesys and Salesforce to help achieve its goals. AIA New Zealand has streamlined its operations, freeing up resources and transforming its customer experience (CX) as a result, reducing average handle time (AHT) by over 20% and increasing customer satisfaction (CSAT) by 7%.

20%
reduction

in average
handle time

7%
improvement

in customer
satisfaction

10%
reduction

in technology
run costs for
telephony

AT A GLANCE

Customer: AIA New Zealand Limited

Industry: Insurance

Location: New Zealand

CHALLENGES

Lacked real-time data, Screen switching hindered agent productivity, Lacked enablement for future AI and analytics innovation

PRODUCT

CX Cloud from Genesys and Salesforce

CAPABILITIES

Quality assurance, Omnichannel routing, Sentiment analysis,
Speech and text analytics, Workforce management

PARTNER

Salesforce

Future-proofing the customer and advisor experience

AIA New Zealand Limited is a leading life insurer whose mission is to help make New Zealand one of the healthiest and best protected nations in the world. The company also provides health, trauma, income protection, disability and cancer care insurance, as well as AIA Vitality, its science-backed health and wellness program, to about 800,000 New Zealanders.

The insurer's contact center operation, which handles more than 18,000 calls a month, is integral to providing its customers with the best possible experience. But outdated technology was hindering its ability to ensure outstanding service delivery and impeding innovative experience improvements. Implementing CX Cloud from Genesys and Salesforce enabled AIA New Zealand to harness AI-Powered Experience Orchestration and achieve outcomes such as a 20% reduction in average handle time and a 7% increase in customer satisfaction.

"We want to provide the best experience we can for customers, and the call center is an important part of that," said Luke Longney, Chief Technology Officer at AIA New Zealand. "It's where a lot of the frontline interactions happen, often at important moments for customers. Our teams need the right tools to focus on those conversations."

Additionally, AIA New Zealand wanted to provide real-time, connected and context-rich customer experiences, while empowering advisers with a "single pane of glass" solution that would help improve their focus and effectiveness. The insurer aimed to reduce administrative overheads and increase efficiency via automation, as well as implement a solution that supports future AI and analytics innovation.

AIA undertook a global RFP process to evaluate and select a customer experience solution that would enable innovation and

support service excellence. Ensuring the platform was a local, SaaS-first, cloud-native solution was non-negotiable and a key factor in evaluating a new system for the company, he said.

Longney selected CX Cloud from Genesys and Salesforce to replace the on-premises telephony, workforce management (WFM), and recording solutions AIA New Zealand was using. This co-developed solution natively unifies an agent workspace in Salesforce with AI-Powered Experience Orchestration capabilities from the Genesys Cloud platform.

“Genesys came out on top in that evaluation from two perspectives: One, the best-in-class capability that’s available on the platform and the value proposition in terms of licensing and operational costs,” said Longney, noting that another factor in the decision was that CX Cloud met its resiliency requirements.

CX Cloud also fits well with the organization’s existing use of Salesforce. “The added benefit of already being a Salesforce CRM user was a fantastic way to fast track the integrated capabilities we’d been wanting to get into our call center.”

“Now, with Genesys and Salesforce on our side, there is no reason why we can’t do everything that any other contact center in the world is doing. It’s opened up a lot of optimism and enthusiasm for the teams to figure out how we can continue to transform our operations and how we show up as a business.”

Luke Longney

Chief Technology Officer, AIA New Zealand

Leaving legacy systems behind for an innovative future

Along with the opportunity to meet its customer experience goals, AIA New Zealand aimed to overcome several challenges related to its previous CX solutions. The biggest was that the on-premises telephony platform, workforce management and call recording technologies AIA New Zealand was using were costly, as well as difficult and time consuming to modify or upgrade.

These legacy technologies impeded progress, making it difficult for the team to quickly adapt to evolving customer needs. They also inhibited the insurer's ability to improve its day-to-day service processes. As a result, it could be difficult for the AIA New Zealand team to deliver the empathetic customer experiences the company was aiming for.

"It's paramount that employees have tools that enable them to focus on the customer or adviser they're talking to," said Longney. "If the call center team are trying to do too many things or figure out how to use the system, it's distracting them from being able to have the quality conversations that are so important."

Another hurdle for AIA New Zealand was a lack of integration that created lengthy, disjointed interactions. Contact center employees had to toggle between disconnected systems, juggling customer information from multiple platforms. "Our team was swivel chairing between a CX environment and a CRM environment," said Longney. "Moving to the cloud was a great opportunity to modernize our environment and get all of the integration and the seamless experience capabilities we were after."

With CX Cloud from Genesys and Salesforce, Longney's team now has access to workforce management, call recording and telephony all in one place. The solution has enabled AIA New Zealand to build a single source of truth for interaction history, sentiment and service insights. This has eliminated complexity, as

well as reduced friction and manual workload, enabling agents to be fully present during interactions. They're also more productive and engaged.

And, with enhancements such as real-time transcription, sentiment analysis and live dashboards, team supervisors continuously monitor performance and sentiment to adapt in real time.

"Moving to the cloud was a great opportunity to modernize our environment and get all of the integration and the seamless experience capabilities we were after."

Luke Longney

Chief Technology Officer, AIA New Zealand

Transitioning technologies and shifting mindsets

Moving from an on-premises environment to a cloud solution turned out to be easier than expected — from both technology implementation and change management perspectives.

The AIA New Zealand team collaborated with Genesys, Salesforce and Kytect, the insurer's support partner for its on-premises call center. Longney noted that having Kytect involved was especially helpful because the systems integrator (SI) is deeply familiar with the insurer's contact center environment, and is a partner of both Genesys and Salesforce.

"That combination of having an SI who understood what Genesys can do and what the integration was like with Salesforce was really important to having a seamless implementation," he said.

The shift to CX Cloud — from business case sign-off to transitioning 250 users — took three and a half months and came in under budget. “The migration experience from on-prem to Genesys Cloud was a fantastic project for us,” said Longney. “The team did an excellent job of getting it to market quickly. We were actually ready two weeks early.”

The transition for the AIA New Zealand frontline team was equally successful.

As with most organizations, previously the AIA New Zealand team was somewhat apprehensive of change. With the transition to CX Cloud, employees quickly and proactively adapted to the new solution. “They’ve really adopted CX Cloud with enthusiasm and that continues as we roll out new features,” said Longney. “The team has been keen to make sure they’re getting the best use out of the system.”

One reason for the positivity: A robust change management plan. During the first rollout, for example, the plan focused on engaging teams early, getting superusers on board, having floor walkers available when the insurer made the cut over to ensure agents were getting real-time support as they adapted to the new system.

“We were all pleasantly surprised with the teams’ ability to understand the technology and then make use of it quickly,” Longney said. “The technology is fundamentally better. It’s easier to use and delivers better outcomes. So, there’s something to be said for moving to new and better technology that makes the change process a bit easier.”

"It's paramount that employees have tools that enable them to focus on the customer or adviser they're talking to. If the call center team are trying to do too many things or figure out how to use the system, it's distracting them from being able to have the quality conversations that are so important."

Luke Longney

Chief Technology Officer, AIA New Zealand

AI unlocks exponential opportunities

For AIA New Zealand, expanding its use of AI to improve not only the agent experience but also the customer experience is a top priority. Longney's goal is to automate as many call center operations as possible. "We have plans this year to introduce more AI services, which will either be directed to customers or directly to our advisors," he said.

CX Cloud and its AI capabilities have enabled AIA New Zealand to streamline processes; for example, by simplifying call wrap-ups with auto-summarization. Its "single pane of glass" view of customer data provides agents with immediate insights, allowing them to focus more on the interaction and less on toggling between systems for needed information.

The insurer is also using Genesys Cloud AI to automate some quality assurance activities, which include capabilities such as sentiment analysis and live dashboards. These enable supervisors to provide real-time coaching and feedback to advisers, with more actionable recommendations and support.

These administrative and process efficiencies free up capacity, which translates to delivering savings for the business and more time to address other priorities.

“That frees up capacity and time, and we’ve been able to absorb some attrition without replacement,” said Longney. “We’ve also been able to take that additional capacity and reinvest it in CX overall and the experience that comes in the contact center.”

Longer term, the benefit of lessening the administrative load on frontline teams allows them to focus more on the customer, which Longney sees as a direct path to providing a differentiated customer experience.

The shift from reactive service to proactive experience design also allows the insurer to respond to customers faster and with more personalized interactions.

“There’s not a single metric in the call center that hasn’t improved since implementing CX Cloud,” said Longney.

In particular, two data points stand out: AIA New Zealand has seen a reduction of more than 20% in its AHT since launching the platform; and, the insurer has seen a 7% improvement in its CSAT scores, increasing from the high 70s to the mid-80s. Additionally, the company has seen reduced call abandonment rates and faster call answer rates.

CX Cloud is having such a positive impact that Longney and his team are excited about what comes next. “Now, with Genesys and Salesforce on our side, there is no reason why we can’t do everything that any other contact center in the world is doing,” said Longney. “And it’s opened up a lot of optimism and enthusiasm for the teams to figure out how we can continue to transform our operations and how we show up as a business.”

Ensuring a healthy future

The success AIA New Zealand has seen so far is a strong motivator for continued innovation, as it works toward leading the insurance

industry in New Zealand by leveraging advanced technology to deliver exceptional customer, advisor and agent experiences.

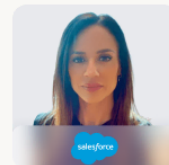
With CX Cloud in place, Longney is focused on expanding the insurer's use of the solution and exploring more advanced capabilities. Top priorities include moving to 100% AI-powered QA coverage, expanding its use of call data to coach and develop staff in real time. Additionally, Longney plans to build a "smarter IVR" by integrating case and claim status updates, payment functions and more. Also on the priorities list is unifying digital channels to create more consistency across interactions.

"We're already seeing the benefits of CX Cloud," said Longney. "Now it's about going deeper and getting even more from the platform."

To learn more about the CX Cloud from Genesys and Salesforce solution mentioned in this case study, visit www.genesys.com/salesforce



How a unified customer view helped AIA New Zealand level up service



How a unified customer view helped AIA New Zealand level up service

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