



# KNOW HOW AI ENHANCES CUSTOMER EXPERIENCE WITH THE HELP OF DATAMATICS DEXTARA

**DATAMATICS**

In the heart of the Northeast United States, the client has been a trusted mutual insurance company with a proud legacy. This company prioritized its customers and communities, which ultimately found itself at a turning point while delivering personal and commercial insurance through independent agencies.

With increased customer expectations—faster service, digital convenience, and more transparency—the client realized the pressing need to modernize its operations to keep up its pace in this modern world.

### **The Challenge: A System Under Pressure**

The client's customer service teams were overwhelmed with queries pouring in and tackling slow access to real-time data, making resolutions sluggish and interactions more fragmented. Meanwhile, outdated claims and payment process delays directly impacted customer satisfaction levels.

This is when the client needed more than just an upgrade; it required an end-to-end operational transformation.

### **The Solution: Modernizing Insurance Operations with AI-Driven Transformation**

That's when **Dextara Datamatics** came to simplify and modernize the client's insurance operations, streamline workflows, and improve the customer and agency experience. As a first step, we migrated from the system Salesforce Service Cloud to Financial Services Cloud (FSC) to address the below challenges:  
Datamatics:

- The Dextara Datamatics team created a unified, 360-degree view of each the client's policyholder by integrating policies, interactions, claims history, and more. Then, Dextara Datamatics implemented **Person Accounts** and **Householding** to manage customer data with clarity.
- Financial Services Cloud enabled the client to handle every detail of policy management—endorsements, billing, renewals, and claims—in one streamlined interface. Real-time integrations with multiple policy administration systems populated the latest policies, current policy terms, policy documents, and customer billing information and ensured data was always accurate and up to date.
- To enhance payments, Dextara built a custom portal integrated with Salesforce and backend systems—simplifying collection, speeding up workflows, and improving visibility for customers and service teams.

### **Claims, Reimagined with FNOL**

The client's claims process was overhauled majorly. The Dextara Datamatics team built a **First Notice of Loss (FNOL)** tool using Experience Cloud, allowing customers and internal users to initiate claims in just a few clicks.

## Empowering Agents and Customers Alike

A new **Agency Portal** gave the client's partner agencies the same tools as internal teams—empowering them to manage policies, claims, and customer relationships independently and efficiently.

Also, Customers got a new **Insured Portal** that allowed them to self-manage policies, submit claims, and make payments online—reducing dependency on agents and support teams.

## Implementation of Einstein Copilot

Dextara leveraged Einstein Copilot, backed by trusted data, Generative AI, and large language models (LLMs) to simplify customer and vendor management besides guiding service reps to understand insights on customer needs with “next best actions” based on real-time data.

## Overcoming Complexities

The migration from Service Cloud to FSC wasn't without challenges. It involved integrating multiple on-premises policy administration systems to ensure seamless access to real-time policy, billing, and claims data. But Dextara Datamatics delivered—ensuring minimal disruption and a smooth transition to real-time, AI-powered operations.

## Impact:



Faster issue resolution and better Customer Service



Improved Operational Efficiency



Elevated Customer Experience with Self-service options and intelligent support



Empowered Teams with Einstein Copilot's insights and real-time data



Operational Resilience by becoming agile and future-ready with scalable systems to adapt as customer needs evolve

# ABOUT **DATAMATICS**

Datamatics enables enterprises to go Deep in Digital to boost their productivity, customer experience, and competitive advantage. Datamatics' portfolio spans across three pillars of Digital Technologies, Digital Operations, and Digital Experiences. It has established products in Intelligent Document Processing, Robotic Process Automation, AI/ML models, Smart Workflows, Business Intelligence, and Automatic Fare Collection.

Datamatics caters to a diverse global clientele across Banking, Financial Services, Insurance, Healthcare, Manufacturing, International Organizations, and Media & Publishing. The Company has a presence across four continents with significant delivery centers in the USA, India, and the Philippines. To learn more about Datamatics, visit [www.datamatics.com](http://www.datamatics.com)

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