



REINVENTING INSURANCE CUSTOMER SERVICE WITH SALESFORCE AI CHATBOT

About Client

Our Client, a well-established regional insurance provider recognized for its exceptional customer service and deep-rooted trust among policyholders, identified the need to evolve in response to changing customer expectations. To enhance responsiveness and deliver seamless support experiences, the Client aimed to modernize their service channels by implementing an AI-powered digital assistant built on Salesforce.

The Challenges: Gaps in Current Customer Support Model

The client faced several critical challenges in their effort to modernize customer support. Their existing chatbot, Minerva, was unable to handle nuanced or complex customer queries, resulting in poor user experiences and unresolved issues. There was no visibility into the chatbot's performance, making it difficult to assess effectiveness or identify areas for improvement. Due to these limitations, the company continued to rely heavily on call center support, leading to increased operational costs and longer response times. Additionally, the lack of a scalable solution prevented them from offering 24/7 customer service without significantly expanding their support team.

The Solution: Salesforce-Native Chatbot Modernization Solution

To overcome the limitations of their existing chatbot, **Datamatics** designed and implemented a fully **Salesforce-native solution**, transforming Minerva from a basic support tool into a **strategic digital service asset**.

At the core of the solution is a **reengineered agent framework** built for **performance, scalability, and long-term adaptability**. The **case creation process** was migrated to **Salesforce Flows**, streamlining the user journey and improving operational efficiency. This allowed for smoother interactions and faster resolution times.

The **conversation logic** was significantly enhanced to effectively handle frequently asked topics such as:

- **Payment processes**
- **Policy access**
- **Claims reporting**
- **Contact and account updates**

To address unresolved queries, a **smart fallback mechanism** was introduced. If the bot cannot resolve a request, it triggers a **guided case creation flow** and ensures **seamless routing to the appropriate internal team**, providing users with immediate confirmation.

The entire solution was built using **Salesforce-native tools**, delivering:

- **Simplified maintenance**
- **Reduced operational costs**
- **Stronger alignment with the client's existing systems**

Simplified Workflow Architecture:

- **User launches chatbot** from the FAQ page
 - **User selects a query category**
1. The bot either:
 - **Retrieves a relevant Knowledge Article, or**
 - **Launches a Salesforce Flow**
 2. If the issue remains unresolved:
 - The bot **offers to create a case** via Flow
 - A **confirmation message** is displayed upon successful case creation

The Impact

Faster Customer Support

No need to scroll through
FAQ pages

Reduced Call Volume

Fewer general inquiries to
live agents

Operational Efficiency

Optimized workload for
Customer Service Unit

24/7 Availability

Chatbot works round-the-clock
without adding to headcount

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