



# Case Study - Insurance



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## About Bajaj Allianz Life Insurance Co. Ltd.

Bajaj Allianz Life Insurance is a joint venture between Bajaj Finserv Limited owned by the Bajaj Group of India and Allianz SE, a European financial services company. The company offers insurance products for financial planning and security and operates in multiple branches across India. In 2020, Bajaj Allianz Life Insurance was voted amongst “Top 75 most valuable Indian Brands 2020”.

As of today, there are more than 25,000 customer service inquiries related to the policy handling process received through email every month, which are of different types. The company will use Simplifai’s Digital Employee in the form of an Emailbot combined with two RPA bots to automate the handling of customer inquiries, identify the intention of these inquiries, and take relevant actions such replying to stakeholders and archival in client’s CRM system.



### Customer representative

**Gaurav Sadana**

Senior Vice President,  
Head Customer Experience & Central Retention

## The challenge

Before adopting Simplifai’s Digital Employee, handling of the customer inquiries severely affected the response time and turnaround time for the company. This was a key challenge for the client as it was also affecting work efficiency and customer satisfaction. Another challenge faced by the client as well as by Simplifai was related to integration of the AI solution with their CRM system. This integration was difficult to carry out, especially as the AI solution required the assistance of two RPA bots from two different sources configured to fetch relevant data from customer inquiries.

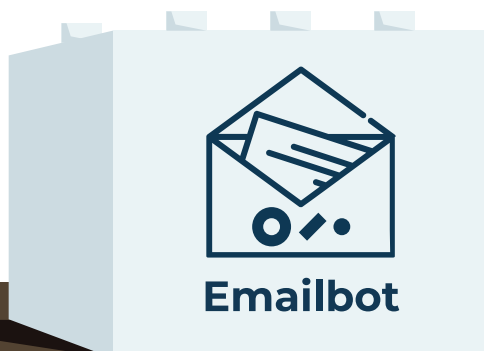
## The goals

The primary goal of the client was to digitalize their customer service processes and improve the turnaround time. This goal was achieved by processing more than 80% of customer inquiries or Service Requests (SRs) received every month, with a success rate of more than 90%. Currently, the goal of the client is to increase email penetration SRs received from both registered and unregistered users.



## Meet BALIC Emailbot

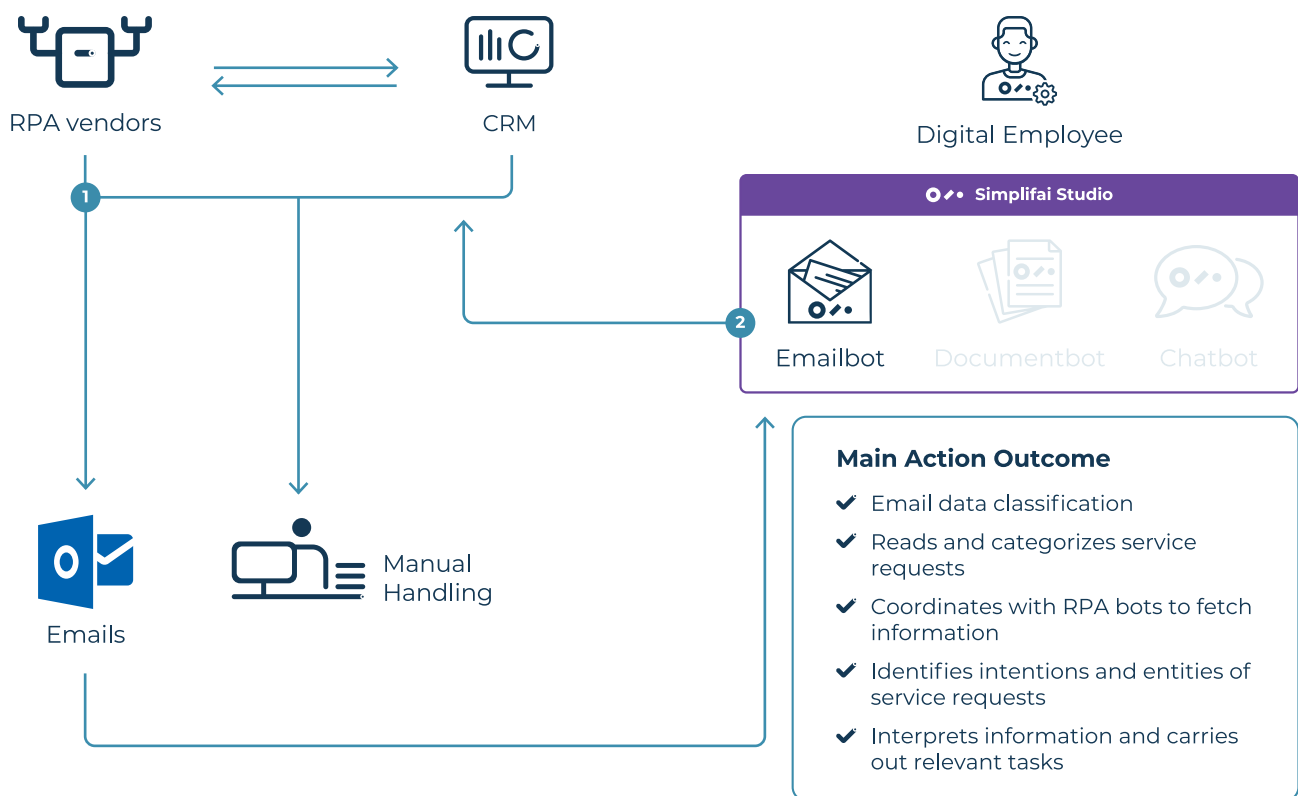
Meet Simplifai Digital Employee for Bajaj Allianz, a digital RPA-driven AI solution that works 24/7 to handle customer service requests from both registered and unregistered users. It handles inquiries about policies, claims, life insurance, general insurance, and premium information. It also reads and interprets inquiries about premium receipt, maturity, surrender pay-out, IT certificate, and policy status, and ensures that 90% of the customer support team's work is automated. The Digital Employee reads every Service Request and carries out smooth coordination between RPA bots, the CRM platform, and human employees for end-to-end automation.



# About the AI solution

The AI-solution by Simplifai comprises an Emailbot and was deployed in two stages or buckets - Registered Users and Unregistered Users. This Emailbot is linked together with two RPA bots, one each from Automation Anywhere and UiPath, and is integrated with CRM at client's side.

The bucket of Unregistered Users was deployed in the first stage and the AI solution in this bucket handles about 200-300 SRs every day (100% of all incoming requests). Whereas the bucket of Registered Users went live in the second phase. Simplifai's AI solution currently handles about 20% of all SRs received under Registered Users. As of current times, the solution for Unregistered Users has 4 intents scheduled in its pipeline and is currently working on 2 intents. It is expected to handle about 600-700 SRs every day after all 6 intents go live.



## Simplifai scope of operation

- 1 Respective RPA bots sends email to Digital Employee.
- 2 Digital Employee identifies and categorizes email type, intents and entities and send back information to respective RPA bots.
- 3 **Automation grade - 94%**

# Work process of the AI solution

1. RPA bot from respective bucket (Registered and Unregistered) logs in to client's CRM which is a ticketing tool and fetches the Service Requests (SRs)
2. The bot reads the SRs fetched and sends them to Simplifai Emailbot in the Simplifai Studio
3. Simplifai Emailbot identifies intents and entities associated with the SRs
4. Based on these parameters, the Emailbot categorizes the SRs
5. Further to this categorization, the Emailbot sends the SRs back to the RPA bot along with the relevant information identified
6. RPA bot updates CRM with this relevant information against the respective SR
7. Most of the SRs are handled automatically, and if any of them require manual handling, then further actions are undertaken like sending the information back to the RPA bot
8. The RPA bot once again attempts to identify the information. If the information is not identified at this step, the SR is forwarded to the client inbox
9. The key action of the solution, i.e. to facilitate replies and forwards to stakeholders is undertaken after the RPA bot identifies intentions and entities when it sends the info back to the CRM for a second time

## Key benefits

- Increased business value
- Improved ROI
- Increased competitiveness
- Better customer service
- Less turnaround time
- Reduced manual errors
- Improved work accuracy and efficiency
- Removal of mundane tasks



# Main results



**~20%**

of all service requests automated



**16 Hrs**

of work cumulatively saved every day



**0**

backlog piling up on Monday



**100%**

usage of AI solution by customer service team



**825**

manual processing hours saved in one month



**24000**

total inquiries processed in April - June 2022



**93.96%**

success rate achieved by the AI solution



**4**

distinct categories of emails identified and handled

