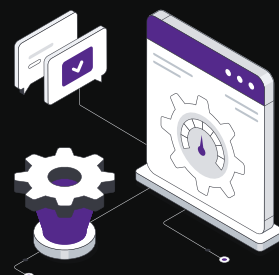


Breaking Through Barriers: How Automation Transformed a Financial Leader's CX



A top financial services firm offering insurance, pensions, and wealth solutions, faced slow, error-prone service. Manual processes hurt approvals and case tracking.

We deployed Dynamics 365 with a customer portal, admin portal, and automated case management. Smart dashboards unified data for better insights. The result? Faster approvals, smoother interactions, and a stronger customer experience—all in one connected system.

Impact

We stepped in with a Dynamics 365 Customer Service solution that turned things around fast:

85%

Faster processing
supercharged response times across the board

24/7

Integrated data & insights
brought everything together in one place

2X

Boost in communication, clearer, quicker conversations with customers

Tezo Edge

Operational Pressure

Manual query processing caused errors and slowed things down.

Approvals got stuck due to an unclear chain of command.

Tracking customer cases was a challenge with no clear visibility.

Customers had to jump through hoops to access their insurance services.

Agents were juggling too many disconnected tools.

Data was scattered across systems, making reporting difficult.



Introduced automated workflows to clean up the process and ensure data accuracy from the start.



A transparent, role-based approval system helped speed things up and reduce bottlenecks.



Real-time tracking tools made it easy to monitor progress and resolve issues faster.



A self-service portal brought everything together—quotes, policies, and updates, all in one place.

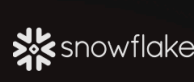
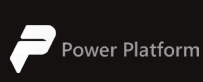


We unified their workspace so they could handle customer interactions more efficiently.



Centralized dashboards pulled everything into one view, making insights clearer and decisions smarter.

Tech Stack



Let's build your AI advantage.

If you're rethinking how your systems, data, and teams should work together, you're in the right place.

[Talk To Us](#)