TTEC Digital enhances self-service capabilities for a global insurance provider

About the client

This global financial services company provides life insurance, health insurance, and investment services to individuals, groups, and businesses around the world.

At-a-glance

- Simplified customer interactions
- Improved data capture
- Reduced error rates
- Higher containment
- Enhanced scalability

PARTNER
AWS

INDUSTRY
Financial services

SERVICES PROVIDED
Customer experience transformation

PRODUCTS USED
Amazon Lex

The challenge

Faced with customer self-service challenges, a leading global insurance provider needed to streamline customer interactions by optimizing their existing Amazon Lex environment and laying the groundwork for more dynamic, conversational experiences.

Despite a robust Amazon Connect deployment, the client experienced several friction points in their self-service flows. Key areas, such as card activation, data capture, and transaction handling, relied on legacy DTMF interfaces and rigid logic structures that limited scalability and customer satisfaction.

The solution

TTEC Digital partnered with the client to deliver focused professional services over a five-week period, deploying two experienced consultants embedded directly with internal teams. The approach was grounded in collaboration and incremental delivery, ensuring the client retained control while benefiting from external expertise.

The results

While the full transformation is ongoing, the engagement successfully delivered a cleaner, more maintainable Amazon Lex configuration. The client is now better positioned to expand use cases with confidence, knowing their infrastructure is optimized for growth and adaptability.

Key impact areas:

Simplifying interactions: Redesigned prompts and flows eliminate unnecessary steps, creating a more intuitive user journey.

Optimizing inputs: Improvements in data capture (e.g., email, patient name, DOB, postal code) reduce error rates and friction during key tasks.

Enhancing logic management: Refactoring existing bot logic allowed better containment of complex checks, ensuring future flows could scale efficiently.

Enabling conversational design: The new foundation empowers a shift toward true conversational AI, including intent switching and deeper dialogue branching.

About TTEC Digital

TTEC Digital is a global leader in customer experience orchestration, combining technology and empathy at the point of conversation. With decades of innovation experience across the world's leading contact center technology platforms — plus in-house expertise in CX strategy, data and analytics, AI and more — TTEC Digital delivers an unmatched skillset for organizations looking to forge deeper customer relationships and drive better business outcomes. Learn more at ttecdigital.com.