

INDUSTRY | INSURANCE

Business insurance company



This is a small business insurance company that's part of the Berkshire Hathaway Insurance Group.

Challenge

The current Einstein Bot for this company struggles with flexibility in addressing customer FAQs and retrieving dynamic information from Public Knowledge Articles. It also lacks the ability to provide customers with easy scheduling options for Claim Adjusters through a Calendly link. Additionally, the bot is restricted by a predefined set of questions, which limits its ability to handle diverse customer inquiries effectively.

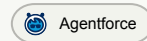
- Limited ability to dynamically retrieve and present relevant information from Public Knowledge Articles.
- No option for customers to schedule appointments with Claim Adjusters via Calendly.
- Predefined set of questions restricting the bot's ability to handle a broad range of customer inquiries.
- Reduced flexibility leading to less efficient customer service interactions.

Solution

To enhance customer service and streamline policy management, we implemented an External Agentforce Service Agent that:

- **Manages Policy Inquiries** – Provides customers with Form links based on Knowledge Articles for efficient policy management.
- **Dynamically Retrieves FAQ Information** – Pulls relevant details from the Public FAQ Knowledge Base to address frequently asked questions.
- **Facilitates Appointment Scheduling** – Shares a Calendly link for customers to easily schedule appointments with Claim Adjusters.
- **Seamless Escalation** – Routes conversations to a Live Service Agent when needed for more complex issues.
- **Improves Efficiency** – Automates responses and actions, reducing customer wait times and enhancing satisfaction.

PRODUCTS USED



Outcome

By the end of the project, biBerk could:

- **Streamline Policy Management** – Customers can easily access relevant forms and information based on their policy inquiries.
- **Enhance FAQ Accessibility** – Dynamic retrieval of information from the Public Knowledge Base ensures quick and accurate responses to common queries.
- **Simplify Appointment Scheduling** – Customers can conveniently book appointments with Claim Adjusters via Calendly, reducing scheduling friction.
- **Improve Efficiency and Support** – Automated assistance reduces the need for live agents, while seamless escalation ensures complex issues are handled swiftly.
- **Boost Customer Satisfaction** – Faster response times and self-service capabilities lead to improved overall customer experience.

