

Customer Story: Aetna

Industry
Insurance

Solutions
CTI, Amazon Connect, Service Cloud

Staff
38,000+ Employees

HQ Office
Trumbull, CN

Aetna offers a variety of health insurance plans to Georgia residents. Aetna Health Insurance is the first national and full-service health insurer to offer consumer-directed healthcare products. Aetna is one of the nation's lead health insurance companies.



Salesforce Challenges

- ⦿ Aetna legacy system did not require validations or accountability around data, was not automated and reports were not clear.
- ⦿ Agents could not access current services of existing customers.
- ⦿ The lead calling process was manual and could not be accessed remotely.
- ⦿ 360 View of a customer is missing.
- ⦿ High volume calls are not handled optimally.
- ⦿ Reporting related to call conversation does not exist.
- ⦿ Automatic routing based on the priority of the call is missing.
- ⦿ All calls are handled by real person and no AI has been built.
- ⦿ Metrics related to call recording like duration of the call, reason for the call and timings of the call is missing.

Access Global Group Solutions

- ⦿ Service Cloud Voice ensures data accountability and validation with complete view of customers and deals.
- ⦿ Validations and automation capture key data needed to process deals and reports.
- ⦿ CTI automates the calling process and agents can work remotely and tracking is controlled through Salesforce.
- ⦿ Leadership and supervisors can quickly access reports with accurate data.
- ⦿ Amazon Connect is used to effectively capture key details related to the service call.
- ⦿ Amazon Connect is used to setup AI for automated assistance to the customers.
- ⦿ Omni channel is setup in Salesforce to route calls based on the set rules.
- ⦿ Amazon Connect's Lex/Polly is used to capture the automated calls.
- ⦿ Lightning flows are used in salesforce to have a step by step visual direction to agents.
- ⦿ Amazon Connect is used to record all the automated calls and metrics and reported back to salesforce.

Salesforce Results

- ⦿ 40% increase in handling calls during the high volume hours.
- ⦿ Resolution of cases has been increased.
- ⦿ Reporting related to calls are effectively reported back to executives/managers which decreased the amount of time spent prior to implementation.
- ⦿ Automation of calls using AI has significantly decreased the amount of calls handled by agents.