



Enhancing insurance customer service productivity with Pega genAI summarization

Information is the key to success. It can shape decision-making processes, drive innovation, and unlock new opportunities. However, the sheer volume of data can be overwhelming, making it challenging for individuals to extract pertinent insights efficiently.

In the insurance industry, organizations harness the power of generative AI to deliver groundbreaking solutions that revolutionize how insurers and customer service agents access and comprehend complex documents and emails. With the global insurance market expected to reach \$7.4 trillion by 2026 and contributing significantly to this growth, AI-driven, real-world performance data summarization becomes crucial.

AI-driven solutions can help insurers process applications 50% faster and reduce error rates by 30%, leading to more accurate risk assessments and improved customer satisfaction. For customer service agents, these AI tools identify patterns, curate content for targeted audiences, and provide actionable resolutions. This efficiency can result in a 40% reduction in response times and a 25% increase in policyholder retention rates.

By leveraging these advanced technologies, insurance companies can better manage the influx of data, enhance operational efficiency, and provide superior service to their clients, ultimately driving growth and profitability in the competitive insurance landscape.

Why is enhancing email efficiency important in the insurance industry?



Navigating complex communications:

Agents face the tedious task of managing multiple email threads for a single policyholder, especially in insurance scenarios.



Coordination among agents:

Different agents working on related cases for one policyholder can lead to overlaps and miscommunications.



Prioritizing tasks:

Agents struggle to prioritize without reviewing all email threads, delaying responses to urgent inquiries.

Enhancing email efficiency with AI-driven solutions streamlines these processes, boosting agent productivity by 30% and improving customer satisfaction by 20%, ultimately enhancing the customer experience in the competitive insurance market.

Solution capabilities

At Virtusa, we understand the challenges of enhancing user productivity. By leveraging Pega genAI summarization features, Virtusa simplifies the process and provides a solution for going through multiple emails. Using genAI prompts, Virtusa provides a summary in simple language and format. The agents can also check on the prioritized list of action items. Below are the three prompts for genAI summarization that were implemented and can be customized according to customer requirements.



Detailed summary of the emails



Action items extracted from the emails



Custom prompt: user can define what they are looking for.

Pega genAI comes with inbuilt masking of sensitive data:

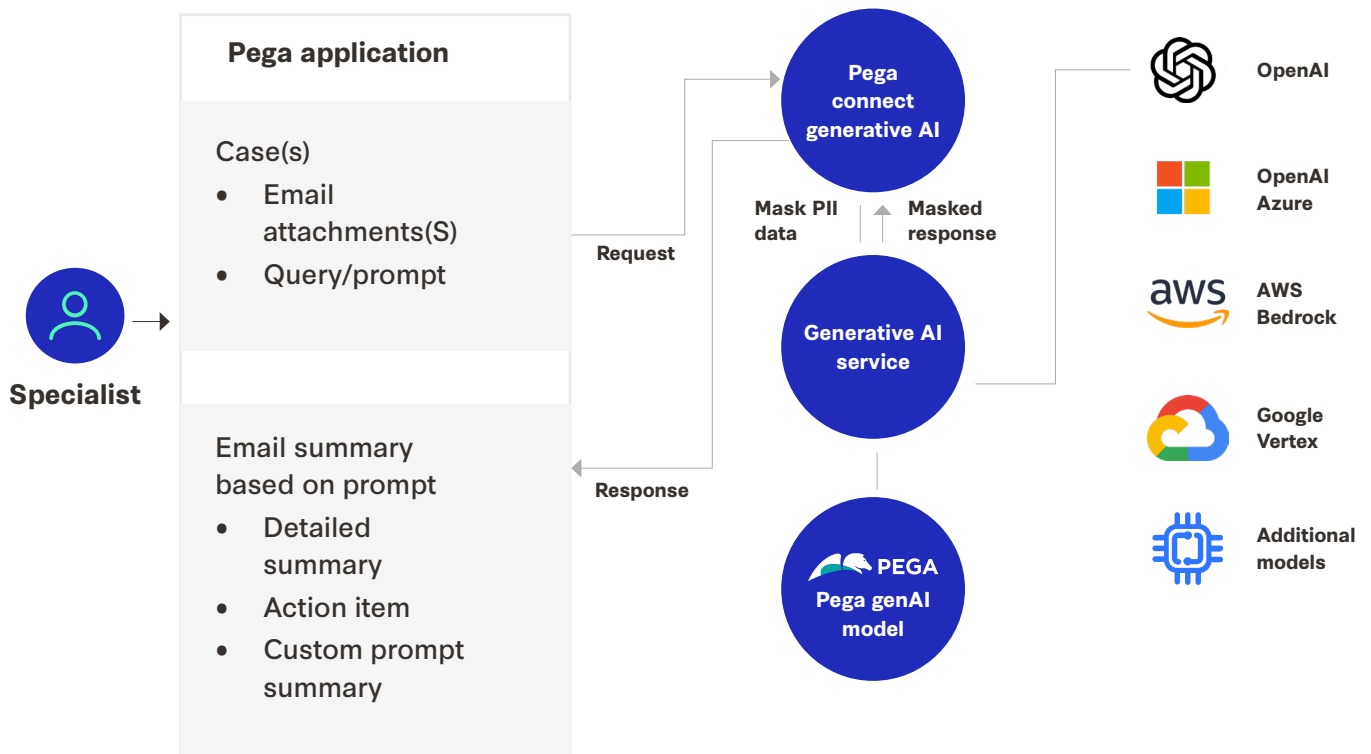


Allows masking sensitive data in the request prompt for the Create generative AI rule.



Default configuration of the masking rule recognizes and masks entities like email IDs, account numbers, etc.

GenAI email summarization flow



Benefits of enhancing email efficiency in the insurance industry:

- **Boost agent and specialist productivity:** Enable insurance professionals to work smarter and faster, improving overall efficiency.
- **Optimize efficiency:** Reduce time spent researching cases and email attachments, allowing specialists to identify issues quickly.
- **Speed up response composition:** Utilize suggested summary responses based on sentiment analysis to reduce composition time.
- **Prioritize actions:** Summarize and suggest priority actions using generative AI, ensuring critical tasks are addressed promptly.
- **Enhanced email management:** Leverage Pega's ability to read through email threads and multiple emails before suggesting responses.
- **Effective query search:** Use custom and pre-defined prompts to search email content and provide actionable responses.
- **Protect PII data:** Pega genAI's built-in PII data masking and unmasking capabilities ensure customer data protection.

Why Virtusa?

- Strong and enduring partnership with Pega for more than 22 years
- Innovation culture with improved operational performance, adoption of the right solution, and integration of emerging technologies
- Evident customer engagement transformation, with an average CSAT of 4.7/5.0, Virtusa ensures optimal delivery and value to its customers.
- Successfully aided clients in service transformation across industries
- Experience in every functional bifurcation of customer service
- Skilled in leveraging Pega Customer Service, Customer Decision Hub, CTI, and all other Pega components

Success stories

- Virtusa helps with a pilot version for a large insurance company using Pega genAI to reduce the manual effort spent on comprehending and looking for relevant data for complex and multiple emails by 60% of the current effort.
- Virtusa helped an American insurance organization reduce costs by \$3.7MN by implementing the Pega customer service framework.
- Virtusa helps a US insurance major save over \$1M by enhancing efficiency of customer service agents with workflow automation.
- Virtusa used the Pega customer service solution for insurance to provide a successful CRM solution for a leading carrier within 14 weeks.
- Virtusa implements Customer Decision Hub to help a large insurance provider reduce policy issuance time from 45 days to 14 days.