

Reimagining Financial & Insurance Services (FINS) with Salesforce + YASH Technologies

Empowering Financial Institutions with Agentic Intelligence and Unified Salesforce Solutions

At **YASH Technologies**, a trusted **Salesforce Summit Consulting Partner**, we drive end-to-end transformation across **Digital Insurance & Lending** segments using the power of **AI, automation, and unified customer intelligence**. Our Salesforce-powered solutions modernize the entire insurance and financial value chain—enhancing policyholder experiences, digitizing operations, and enabling proactive engagement through autonomous agents powered by **Agentforce**.

We offer Integrated Transformation Across Insurance and Digital Lending value chain

YASH brings deep functional and technical expertise in Financial Services Cloud (FSC), Experience Cloud, MuleSoft, and Agentforce to enable seamless, compliant, and scalable financial operations. We help insurers and lenders transition from fragmented systems to a **unified, intelligent platform** that supports:

Business Function	Salesforce-Powered Capabilities by YASH
Customer Onboarding	Digital KYC, AML checks, document workflows via FSC + Experience Cloud
Quotation & Pricing	Real-time quote generation via insurance product pricing logic and pricing APIs for individual and commercial policies
Policy/Loan Issuance & Admin	Automated setup, renewals, amendments, and servicing via FSC + MuleSoft
Underwriting & Risk	AI-driven risk profiling and rule-based underwriting workflows
Claims / FNOL Management	Structured FNOL, AI triage, document handling, and SLA-prioritized claim settlement
Reinsurance Processing	Treaty configuration, claim ceding, and financial recovery models in FSC
Broker/Agent Enablement	Real-time portals for quoting, lead management, commission tracking
Regulatory Compliance	IRDA/NAIC-aligned regulatory reporting with automated audit logs and dashboards

We have also developed reusable **Agentic assets for Insurance and Digital Lending space using** Agentforce for Sales, Marketing & Services which offers Intelligent Engagement, Faster Conversions & Quicker Resolutions.

Agentforce for Sales & Marketing – Intelligent Engagement and Faster Conversions (Beneficial for Customers’ Customer, Agents/Brokers, Sales Team)

We leverage Agentforce to enable AI-powered insurance and lending sales by automating and optimizing marketing campaigns, lead handling, and product positioning—resulting in higher productivity, quicker closures, and superior customer engagement.

Use Cases	Agentic Impact on Sales & Marketing Activities
Lead Segmentation & Targeting	Dynamically segments leads based on LTV, intent, demographics, past behavior, and life stage
Automated Lead Qualification (AI-BRDs)	Uses AI rules to instantly qualify or disqualify leads for different insurance or loan products
Insurance Product/Package Recommendation Engine	Recommends personalized policy or loan bundles based on customer history, portfolio, and behavior
Dynamic Messaging & Email Templates	Auto-generates personalized campaign emails and pitch decks aligned to customer’s interests
Quote Summary Intelligence	Summarizes and compares tailored quotes, highlighting premium options and benefit-value mapping
Upsell & Cross-Sell Predictors	Flags eligible customers likely to add riders, upgrade coverage, or apply for refinancing offers

Possible Business Driven Outcomes using Agentforce for Sales & Marketing

3x
increase in sales agent productivity

40–50%
improvement in lead-to-close cycle

Higher campaign ROI
through AI-driven personalization

Faster deal closures
and higher customer satisfaction

Agentforce for Core Insurance Business Processes (Beneficial for Underwriters & Claim Approvers)

YASH leverages **Salesforce Agentforce** to deliver AI-driven autonomy and decision intelligence across critical insurance processes:

Use Cases	Agentic Impact on Business Process Orchestration
FNOL Summary & Intelligence for claim acceptance or rejection	AI summarizes historical FNOL records, categorizes loss types, and flags anomalies.
AI Powered Fraud Detection for Claim processing	Autonomous anomaly detection in claims based on behavioral and transactional history.
Better Customer 360 with Claim Insights for proper claim approval	Instantly surfaces a customer's full policy, claim, and contact history in one view.

Possible Business Driven Outcomes using Agentforce for Business Process Orchestration

Faster FNOL Summary & Intelligence

Smarter assistant in Fraud Detection Process powered by Agentforce AI

Better Customer 360 with Claim Insights and past records of the customer in a single view

Agentforce for Service – AI-Powered Support, Resolution & Claims Intelligence (Benifical for Customers’ Customer, Contact Center)

We empower insurers to deliver superior, personalized service at scale through **Agentforce-driven service agents** that assist in automating routine tasks, predicting customer needs, and enabling proactive resolutions.

Use Cases	Agentic Impact on Claims & Service
AI Chatbot Agents for FNOL	Collect incident data, validate documents & auto-triage claims intake via conversational bots
Smart Case Summarization	Condenses historical data and interactions for faster CSR resolution and claim investigation
Knowledge Article Recommendations	Auto-suggests relevant SOPs or solutions during case handling for faster resolution
Autonomous Email/Chat Reply Generation	AI drafts contextual responses based on policy details and customer sentiment
Customer 360 + Risk Insights	Displays all policies, historical claims, and associated risks in real-time
Sentiment & SLA Escalation Detection	Monitors tone and urgency, alerting teams for timely escalations

Possible Business Driven Outcomes using Agentforce for Services

40% reduction in case resolution time

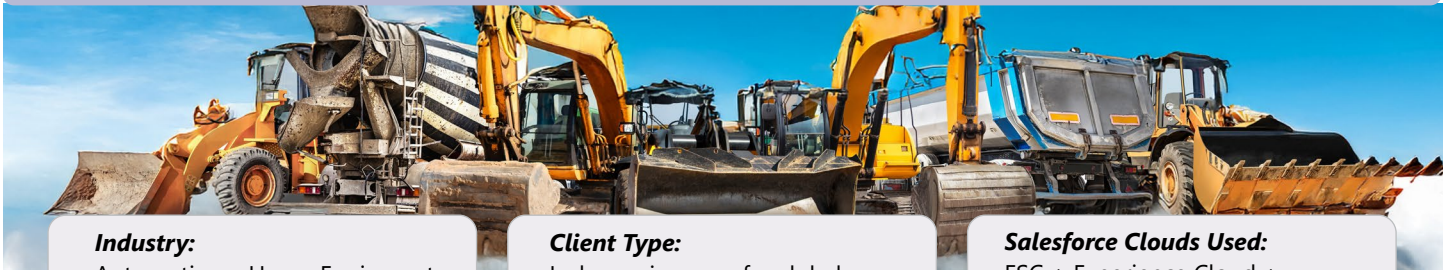
Improved fraud detection accuracy

Increased customer retention and NPS

Significant reduction in service handling cost

Flagship Case Study 1

Reinsurance Transformation for a US-Based Heavy Vehicle Manufacturer’s Insurance Arm



Industry:
Automotive + Heavy Equipment Insurance

Client Type:
In-house insurer of a global heavy equipment manufacturer

Salesforce Clouds Used:
FSC + Experience Cloud + MuleSoft

Challenge:
The client—a US-based captive insurer supporting the sales of high-value heavy-duty vehicles (e.g., Caterpillar machinery)—faced siloed systems for policy issuance, claim management, and reinsurance processing. The manual process of managing reinsurance treaties, ceding logic, and claims recoveries delayed settlements and created compliance risks.

- YASH’s Solution**
- Developed FSC-based policy and claims objects customized for commercial heavy vehicle insurance
 - Built reinsurance automation logic for treaty matching, claim ceding, and recovery calculation
 - Integrated with ERP and PAS systems via MuleSoft for synchronized financial and claims data
 - Delivered agent portals for dealers to generate quotes and track policy performance

- Business Impact:**
- 65% reduction in claim-to-recovery cycle
 - Streamlined reinsurance compliance and audit trails
 - Real-time quote and policy issuance capabilities to support sales enablement

Flagship Case Study 2

Digital Core Insurance Transformation for a UAE National Insurance Company



Industry:
General &
Life Insurance

Client Type:
Government-licensed national
insurer in the UAE

Salesforce Clouds Used:
FSC + Sales Cloud + Service Cloud
+ Experience Cloud

Challenge:

The insurer operated across multiple product lines with siloed legacy systems for health, motor, life, and property insurance. Each LOB had a different customer service process, leading to inefficiencies and compliance risks. A unified transformation was required to modernize every touchpoint and bring the entire business onto a future-ready CRM platform.

YASH's Solution:

- Defined a unified FSC-based data model that consolidated product, policy, claims, and customer records across all lines
- Reimagined end-to-end processes from onboarding → quote → underwriting → FNOL → claims → regulatory reporting under one umbrella platform
- Used Experience Cloud for agents, brokers, and end customers to access real-time data
- Built dynamic dashboards for IRDA-like compliance, AML flagging, and agent commission tracking

Business Impact:

- Unified Salesforce platform for all insurance processes
- 75% reduction in onboarding time for new customers and partners
- Transparent, auditable claims and reporting with real-time SLA monitoring
- Better partner engagement with self-service quote & claims portals

Why YASH Technologies for FINS Digital Transformation?

**Salesforce Summit
Partner Recognition**
with 300+ Salesforce
professionals

**Deep Domain
Accelerators**
purpose-built for
Financial Services &
Insurance

**Agentforce-Powered
AI Intelligence** for
advanced decision
automation

Global Delivery
with local expertise
across North
America, UAE, India,
Europe

**End-to-End
Transformation**
capabilities from
advisory to
implementation
to AMS

Let's Transform the Future of Insurance & Financial Services Together

Whether you're a traditional insurer undergoing legacy modernization or a digital-first lending institution, YASH helps you sell smarter, resolve faster, and scale with confidence using **Salesforce + Agentforce**.



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