



Insurance Reinvented — Trust, Compliance & ROI

The New Insurance Reality

Insurers today must balance customer trust, regulatory compliance, and operational efficiency — all while delivering faster claims and more personalized experiences. YASH enables financial services enterprises to modernize policy administration, underwriting, and claims processing with Salesforce Insurance Cloud, purpose-built accelerators, and Agentforce AI agents. The outcome is measurable ROI, reduced operational costs, and stronger customer loyalty at scale.

Proven Impact

40%
Reduction in underwriting TAT



End-to-end automation of submissions, premium calculations, and invoicing eliminated manual intervention across the Commercial Insurance underwriting lifecycle.

100%
Visibility into lead source performance



Replacing manual tracking with automated broker routing, campaign attribution, and executive dashboards linking marketing spend directly to revenue impact.

98%
Reduction in manual effort



With 100% elimination of redundant notifications, ensuring citizens receive accurate, targeted alerts via email and SMS without any manual intervention.

Solutions & Accelerators

- **Policy Administration** — End-to-end renewal automation, DocuSign integration, and multi-line-of-business lifecycle management to reduce policy servicing costs and processing time.
- **Claims Management** — FNOL-to-settlement automation, Einstein Vision damage estimation, and ML-powered fraud detection that accelerates claims resolution while protecting against losses.
- **Underwriting Workbench** — Risk appetite engine with Einstein scoring and ISO/LexisNexis data enrichment, enabling underwriters to make faster, more accurate risk decisions.
- **Product Factory** — No-code product studio with a configurable rating engine, enabling faster time-to-market for new insurance products without heavy IT dependency.
- **Finance & Billing** — Flexible payment plans, multi-currency support, and SAP/Oracle GL integration for accurate, automated financial operations across lines of business.
- **Customer & Partner Portals** — Self-service portals for policyholders, claimants, and brokers — including policy views, claims tracking, and real-time broker quoting tools.
- **Analytics & AI** — Tableau CRM dashboards, churn propensity models, and fraud anomaly alerts that turn data into proactive, revenue-protecting action.

Agentforce AI Agents

- **Policy Servicing Agent** — Handles policyholder inquiries, endorsements, and mid-term changes autonomously — reducing servicing costs and improving response times without agent involvement.
- **FNOL & Claims Intake Agent** — Guides claimants through the first notice of loss process, validates policy coverage, and assigns adjusters instantly — shrinking claim cycle times from days to hours.
- **Underwriting Assistant Agent** — Screens new submissions, enriches data from third-party sources, scores risk, and auto-binds standard risks — freeing underwriters to focus on complex cases.
- **Customer Care Agent** — Resolves billing queries, renewal questions, and payment issues with intelligent escalation, delivering consistent service across digital and voice channels.
- **Broker Support Agent** — Assists brokers with appetite queries, submission status tracking, and commission reporting — strengthening channel relationships and accelerating quote turnaround.
- **Fraud Detection Agent** — Monitors claims in real time for anomalies, cross-references ISO ClaimSearch, and triggers investigation workflows — reducing fraudulent payouts before they occur.

Client Success Stories

Leading Canadian Insurance Brokerage Firm
Modernized underwriting platform from Salesforce Classic to Lightning — automating premium calculations, policy lifecycle, and invoicing to dramatically reduce turnaround time.

US Specialty Insurer Transformed a fragmented, spreadsheet-driven lead management process into a unified Salesforce platform — delivering full broker visibility, campaign ROI tracking, and automated lead lifecycle management.

US Insurance Broker Deployed a Salesforce Marketing Cloud solution for a public agency to automate real-time weather alert notifications — triggered by AccuWeather severity levels and postal codes, eliminating manual outreach entirely.

YASH: Your Partner in Insurance Reinvention

From policy administration to claims and fraud detection, YASH enables insurers across life, health, property, and casualty to achieve cost savings, regulatory compliance, and lasting customer trust. Trusted by leading insurance carriers, wealth management firms, and financial services organizations globally, we build the Agentic Enterprise for Insurance — where every policy, claim, and customer interaction is intelligent, compliant, and ROI-driven.