

Claiming Success: How an Insurance Provider Streamlined Service With Agentforce

A leading health insurance provider enlists TEKsystems Global Services (TGS) to deliver exceptional member support through innovative AI solutions with Agentforce, enabling better efficiency and end customer satisfaction.





Mastering the Momentum of Technology in Healthcare

As a leading health insurance provider, our customer wanted to improve their member and provider experience by leveraging AI to optimize their customer success representative (CSR) workflows.



What We Did

[AI, ML and Automation](#)



Industry

[Healthcare](#)



Results

Improved member and provider experience

Increased efficiency

Scalable model



Key Integrations

[Salesforce](#)

Agentforce

The Challenge

Simplifying Information Access

[Diagnosing a CSR System](#)

The health insurance provider wanted to improve their overall member and provider experience by enhancing service efficiency, improving accuracy and reducing resolution time. They envisioned an agentic platform supporting CSR workflows powered by Salesforce Agentforce. The goals? More satisfied members and providers and an enhanced experience for CSRs thanks to an agentic solution eliminating the “swivel chair” to access information and tools.

Our Solution

Establishing a Unified CSR Platform

[Charting a Clear Path to System Health](#)

Our customer’s commitment to their members and providers is underscored in their quest for continuous improvement. They strive to make life easier when supporting members and providers by understanding their claims and overall benefit plans through streamlined processes and systems.

Enter TEKsystems Global Services (TGS), a [Salesforce Summit Partner](#) with deep Agentforce expertise and over 150 AI certifications. Our long-standing partnership with this insurance provider across Salesforce initiatives, as well as our AI leadership and proven domain expertise, set this engagement on a path of strategic collaboration and innovation.

Powerful Partnership

Implementing an Intelligent Agent

[Enhancing Member Support](#)

Our top priority was enabling CSRs to quickly access the status and details of claims and associated benefit plans. We developed an intelligent agent with Agentforce that retrieved:

- Claim status
- Creation and update dates
- Copay
- Billed and approved amounts
- Benefit Plan lookups and plan details



With secure API integration and strong compliance guardrails, the AI agent provided CSRs with detailed Member360. Our team implemented real-world testing with CSR feedback to ensure the agent properly retrieved narratives based on plan, category and effective date.

Real-World Results

The implementation of a custom-designed intelligent agent improved member and CSR experiences, leading to high satisfaction for both parties. Plus, rapid deployment and adoption meant faster time to value.

The organization experienced additional value impacts, including:

- Efficiency gains: CSRs could now handle more calls with quicker resolutions.
- Increased member and provider satisfaction: Accurate, timely responses led to more satisfied end customers.
- Scalable model: Agentforce use cases are replicable across other healthcare payers.
- Continuous value: Agents allowed for additional functionality, taking action for further automation and efficiency gains.

Our partnership with the customer continues as our team explores more use cases and capabilities for the organization's Agentforce implementation. Together, we'll enhance support and operational agility, satisfying members and CSRs.

Callout Metrics

Decreased call resolution times

Upgraded member experience

About TEKsystems and TEKsystems Global Services®

We're a leading provider of business and technology services. We accelerate business transformation for our customers. Our expertise in strategy, design, execution and operations unlocks business value through a range of solutions. We're a team of 80,000 strong, working with over 6,000 customers—including 80% of the Fortune 500—across North America, Europe and Asia, who partner with us for our scale, full-stack capabilities and speed. We're strategic thinkers, hands-on collaborators, helping customers capitalize on change and master the momentum of technology. We're building tomorrow by delivering business outcomes and making positive impacts in our global communities. TEKsystems and TEKsystems Global Services are Allegis Group companies. Learn more at [TEKsystems.com](https://www.teksystems.com).

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