



Migration of On-Premise Insurance Application to Salesforce

QBurst migrated the client's on-premise insurance application to a Salesforce platform, delivering a mobile-responsive customer portal and leveraging Financial Services Cloud (FSC) for enhanced policy, claims, and account management.

Overview

QBurst successfully addressed the client's legacy system challenges by rebuilding their customer portal on Salesforce.

- **FSC Implementation:** Migrated the legacy application to Salesforce and utilized Financial Services Cloud (FSC) for enhanced policy and claims management.
- **Bi-Directional Sync:** Overcame payload size limitations (utilizing up to 2GB document capacity) and enabled reliable bi-directional data sync for critical customer information.
- **Modern UX:** Delivered a fully mobile-responsive portal, improving accessibility and customer satisfaction for policy and claims viewing.



Client Profile

Based in Australia, the client specializes in automobile insurance for its partners, underwriting general insurance products under its own brand as well as for leading automobile insurance brands.

Challenges

- **Payload Size Constraints:** Strict technical limitations made it impossible to sync large policy schedule documents and complex policy data, disrupting core operations.
- **Poor Data Sync:** Difficulties handling bi-directional updates for critical customer fields (email, phone, marketing consent), leading to inconsistent data and potential compliance issues.
- **Outdated UX/UI:** The portal suffered from existing bugs, a non-responsive interface, and a clunky design, which frustrated customers and required constant manual bug fixes.

- **Limited Claims Visibility:** Customers lacked a quick, self-service channel to view claims records and essential policy documentation directly.

QBurst Solution: Enhancing Customer Service and Efficiency with Salesforce Financial Services Cloud

QBurst performed a comprehensive migration to Salesforce, utilizing Sales Cloud, Financial Services Cloud, and Experience Cloud to build a multi-functional, modern platform. The solution focused on eliminating technical debt and maximizing Salesforce's native capabilities.

Key Solution Implementations

- **Policy Sync Enhancement:** Leveraged Salesforce Content Documents to overcome payload size restrictions, allowing the synchronization of policy data up to 2GB in size. Implemented native REST APIs for seamless policy synchronization.
- **Bi-Directional Sync:** Upgraded APIs and Apex web services to support reliable bi-directional syncing for fields like contact details and marketing consent flags.
- **Claims and Document Access:** Developed dynamic Lightning Web Components (LWC) and new APIs to retrieve claims records from the external Claims Express system in real-time without storing them in the Salesforce database. We also enabled direct customer download of policy schedule documents from the Policy Express system.
- **Mobile and UX Modernization:** Addressed existing bugs, upgraded CSS, and developed LWC components to align the interface with design specifications, ensuring full mobile responsiveness for all devices.

Technical Highlights

- **Dynamic Customer Portal:** Built a mobile-responsive portal using dynamic LWC pages for policy and claims management.

- **Data Handling:** Utilized Salesforce Content Documents to manage policy synchronization payloads up to 2GB in size.
- **Integration:** Used native REST API integration with backend Ruby on Rails applications.
- **Security and Provisioning:** Implemented JIT (Just-in-Time) user provisioning and SAML SSO with Active Directory for secure login.
- **Audit Trail:** Custom Apex and Triggers were developed for streamlined tracking of account linking and delinking history.

Impact

- **Improved Efficiency:** Better payload handling ensured efficient management of large data volumes, enhancing operational efficiency and reducing policy sync failures by 55%.
- **Enhanced Customer Experience:** LWC components and Rest APIs provided quick, self-service access to claims records, improving customer satisfaction and reducing call center load by 40%.
- **Better Insights and Streamlined Operations:** The simplified custom account management and tracking solution improved data integrity and ensured clear audit trails, improving data confidence for reporting by 60%.
- **Eliminated Communication Silos:** Bi-directional sync enabled seamless communication, improving customer service and ensuring compliance with marketing preferences.
- **Eliminated Revenue Leakage:** The digitized claims process eliminated missing claims and ensured the capture of all billable events.