



Achieving 5x Faster Speed-to-Market for AI Initiatives within Salesforce CRM at a Fortune 100 Insurer



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Executive Summary

The Analytics & AI department, at the Fortune 75 insurer, is responsible for running all AI initiatives, including building models and delivering business improvement. These AI initiatives are both business-facing (models for use by their teams of underwriters, sales executives, and agencies) and consumer-facing. Achieving a faster speed to market is essential to enhancing their effectiveness and responsiveness.

The Analytics & AI team faced significant delays and inefficiencies in getting the models 'off the shelf' and putting them to work for the business, negatively impacting their speed to market. Salesforce CRM is extensively used by the sales, account management, and underwriting teams.

The Challenge: Delayed Time-to-Value for AI Models



Time consuming & Complex Integrations

The process of integrating AI models into daily workflows within Salesforce needed hundreds of hours of work for every AI initiative. It required building extensive data pipelines, integrations with Salesforce, and developing the right user experience for AI within the business user's workflow.

Limited End-User Feedback

The team struggled to evaluate model effectiveness in real-world scenarios. There was no standardized way to evaluate what was working and what was not, making it difficult to iterate based on business user feedback and pilot data before wider rollouts.

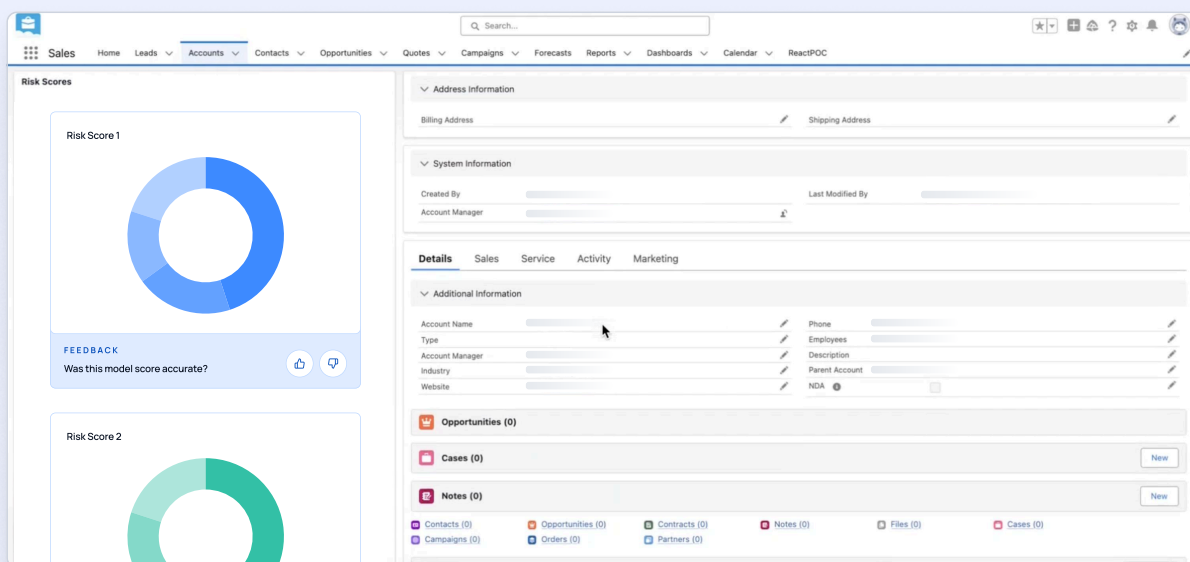
Broken Prioritization

Getting AI insights into the hands of end-users within their daily workflows proved challenging. The team spent considerable time deliberating on what to build, how to prioritize projects, and creating business cases for AI initiatives.



The Solution: Delivering AI-Powered Insights Within Salesforce

The challenge we set out to address with a solution was quickly and iteratively bringing insights from models that were “on-the-shelf” to the end business users they were designed for.



Integrating AI model data rapidly into Salesforce

AI Squared enabled quick model deployment through pre-built connectors and no-code data processing, significantly reducing integration time with Salesforce CRM.

Making AI easily accessible in the context of business user's workflow

The solution embedded AI insights directly into users' existing CRM workflows, presenting predictions in the form of dynamic visualizations at the point of decision-making.

Capturing & Analyzing end user feedback

Built-in feedback collection capabilities allowed testing with select users, helping measure model effectiveness and inform AI project prioritization.

Ensuring compliance with data security standards and privacy regulations

Implemented strict access controls and permissions to safeguard sensitive data while securely accessing and syncing data from AWS to Salesforce. The end-to-end solution was deployed within the customer's VPC to comply with the customer's need for enhanced data security.

Impact Delivered

- ✓ **90% reduction in integration time:** Slashed post-processing and integration time by 90%, reducing hundreds of development hours to just 25-30 hours.
- ✓ **Accelerating the time-to-value of AI models by 85%:** Reduced the overall AI initiative evaluation timeline from 6+ months to under 30 days.
- ✓ **Faster speed-to-market for the highest impact AI initiatives:** Enabled business and data teams to self-serve their AI implementation needs. Streamlined the feedback loop and iteration process, allowing teams to rapidly adjust and optimize AI solutions without technical bottlenecks.

"To put it on the table candidly - this is valuable. And it solves major issues that our business partners face. There is a desire to consume faster. The desire also to make the feedback & iterative process faster. Just a way to simply collect feedback even." — Chief Analytics Officer

Conclusion

AI Squared significantly accelerated the time-to-market for AI initiatives at this Fortune 100 Insurance company. Through rapid prototyping and iterations using AI Squared, and a seamless integration with Salesforce, the AI & Analytics team accelerated both the adoption and effectiveness of their AI models.

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