

# Optimizing the Client's Digital Interaction with Its Customers

Case Study | Business Intelligence & Reporting

## LARGE INSURANCE MAJOR

### THE PROBLEM

The client had a requirement to optimize its digital interaction with customers by (i) listing the top digital pain points and self-service needs and (ii) identifying opportunities to be more proactive in detecting and addressing digital pain points.

The client wanted to understand cross-sell quoting versus buying patterns to (i) identify the efficiency of the customer cross-sell process and (ii) to identify opportunities to improve cross-sell through next best action.

### THE SOLUTION

Mastech InfoTrellis helped the client by offering the best solution to meet the program's goals.

Worked with the client team to derive functional requirements from business requirements.

Involved in extending the data model to suit the client's business model.

Involved in data mapping and profiling to facilitate in further data synthesis.

Worked on data ingestion, matching enrichment, and matching to identify proper matches and suspects.

We helped the client enable different views and perspectives of the same data as required by end users.

Developed visualizations in Tableau and ZoomData.

### THE OUTCOME

The Mastech InfoTrellis team ingested data from all sources, successfully synthesized all data, and completed reasoning configuration.

Surfaced Customer 360 using AllSight Customer Perspective and Customer Graph UI.

Demonstrated visualization of AllSight Customer Intelligence Management data using Tableau and ZoomData.

Reviewed sample set of individual records to demonstrate how they are synthesized and enriched.

Built confidence that the base data store built is extensible, adequate to serve a full data lake, and that this approach can serve as a foundation for future use cases.