Case Study

Care without complexity

Enhancing advisor efficiency and member support with AI-powered Copilot for a health insurance provider

The Modernization Engineering Company

SONATA SOFTWARE

Summary

Sonata Software transformed the client's member support operations by redesigning a cluttered user interface, integrating AI-powered Copilot assistance, and implementing omnichannel chat capabilities. The solution streamlined advisor workflows, reduced call handling times, and enhanced customer satisfaction through real-time, authenticated support across multiple channels.

Customer overview

Louisiana-headquartered health insurance company dedicated to improving the health and lives of people by providing a wide range of health coverage options, wellness programs and partnerships with healthcare providers statewide.

Pressure points

- User interface was cluttered with excessive white space, making navigation inefficient
- Advisors spent time reading full sections for benefits and eligibility, increasing call duration
- Alerts lacked accuracy and timeliness on member status
- Support was limited to phone calls; no chat or self-service options were available

Solution highlights

- User interface was redesigned for a cleaner, compact layout with dynamic field visibility and complaint-specific sections
- Copilot was integrated to assist advisors with instant answers to benefits and eligibility queries, reducing manual effort
- Real-time alerts for accurate member status updates
- Omnichannel chat was introduced, offering customers a faster, more flexible support option beyond phone calls

Results that speak volumes

- Improved advisor productivity with streamlined UI and reduced navigation effort
- Faster query resolution via Omnichannel chat, enhancing customer satisfaction
- Reduced call handling time through Copilot-powered instant responses
- Enhanced case clarity with visual status indicators
- Delivered authenticated, real-time support across multiple channels