



# CASE STUDY



Empowered Insurance Excellence: Digital Transformation for Singlife with Aviva with Salesforce Financial Service Cloud

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# OVERVIEW

Singlife with Aviva, a leading insurance provider, wanted to transform how its policyholders, distributors, and partners engaged with the company.

## BACKGROUND

Singapore Life Limited, commonly known as Singlife, is a Singaporean insurance company. Singlife today is one of the largest homegrown financial services companies in Singapore.

Singlife sought to provide a single 360-degree view of policyholders, financial advisors, and partners to deliver seamless, personalized, and compliant experiences.

To achieve this, Singlife partnered with TechMatrix Consulting to leverage Salesforce Financial Services Cloud and transform customer service, advisor productivity, and compliance operations through unified data, automation, and omni-channel engagement.



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# CHALLENGES

With its rapidly growing base of policyholders, distributor channels, and partner networks, Singlife with Aviva faced increasing complexity in managing customer interactions and internal operations.

## **DISJOINTED POLICYHOLDER DATA**

Agents lacked a single source of truth across policies, claims, and customer history.

## **LIMITED FINANCIAL ADVISOR INSIGHTS**

Advisors did not have visibility into distributor channels, partner relationships, and performance.

## **AGENT PRODUCTIVITY GAPS**

Manual processes slowed down policy servicing, claims resolution, and customer support.

## **COLLABORATION INEFFICIENCIES**

Internal teams and backend departments worked in silos, delaying responses to customer requests.

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# SOLUTIONS

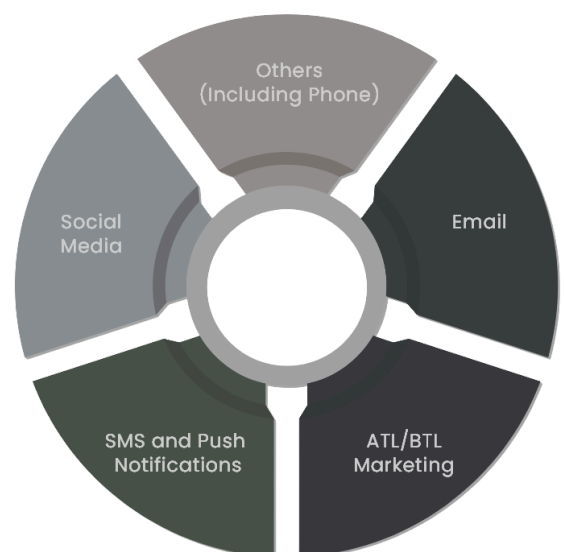
To streamline Aviva Singlife's complex customer service challenges, TechMatrix implemented a Salesforce Financial Services Cloud solution that addressed Singlife's challenges with a comprehensive, future-ready architecture

## 360° VIEWS FOR POLICYHOLDERS AND ADVISORS

A single, consolidated profile was created for policyholders and financial advisors by integrating Salesforce with backend Core and CMS systems. Agents now had a holistic 360-degree view of customer policies, claims, and service history, while advisors gained visibility into distributor channels, partner relationships, and performance.

## OMNI-CHANNEL ENGAGEMENT AND SERVICE AUTOMATION

Salesforce enabled Singlife to support seamless interactions across email, call, WhatsApp, and live chat, ensuring consistent customer experiences. Service and support processes were automated with Salesforce workflows and CTI integration, allowing agents to handle queries efficiently and improve response times.



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# COLLABORATIVE AND COMPLIANT OPERATIONS PLATFORM

The platform enabled internal collaboration across policy servicing, claims teams, and back-end departments, ensuring every request was handled seamlessly.



Role-based data access, advanced data-sharing rules, and secure interaction summaries ensured compliance with industry regulations. This not only strengthened governance but also gave administrators and compliance managers greater confidence in adhering to corporate and regulatory standards.

# REAL-TIME INSIGHTS, ANALYTICS, AND INTELLIGENT ALERTS

Intuitive dashboards and real-time analytics equipped agents and management with actionable insights into policyholder needs, claims performance, and advisor effectiveness.

Automated alerts, action plans, and relationship maps further enhanced decision-making by highlighting critical client activities, compliance requirements, and cross-sell opportunities. These insights empowered Singlife to deliver timely, proactive, and customer-centric services.



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# RESULTS

Post-implementation, Singlife with Aviva transformed customer service, advisor operations, and compliance. Enhanced controls and real-time analytics improved satisfaction, boosted productivity, and positioned the company to scale in a digital-first insurance landscape.

## ENHANCED CUSTOMER EXPERIENCE

Policyholders benefited from personalized, proactive, and faster resolution experiences.

## ADVANCED ADVISOR EMPOWERMENT

Financial Advisors gained holistic visibility across relationships, improving partner engagement and sales strategies.

## SEAMLESS COLLABORATION

Unified systems eliminated silos, enabling backend and servicing teams to deliver a seamless customer journey.

## AGENT PRODUCTIVITY BOOST

Automation reduced manual tasks, enabling agents to focus on high-value interactions.

## STRONGER COMPLIANCE & GOVERNANCE

Advanced data-sharing rules and archiving practices ensured strict regulatory compliance.

## ACTIONABLE INSIGHTS

Dashboards and real-time analytics gave leadership teams the intelligence to optimize coverage and improve business outcomes.

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# THANK YOU!

Inspired by Singlife's success story?

Get in touch with us to start your journey toward innovative AI-Powered business automations.



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