

Transforming Customer Intelligence and Policyholder Engagement for a Leading U.S. Insurance Provider

Client Profile

A leading U.S.-based financial services and insurance provider specializing in long-term care insurance, life insurance, annuities, and mortgage insurance solutions.



ITHENA's iSIP solution unified customer intelligence, AI-powered sentiment analysis, competitive benchmarking, and agentic AI recommendations into a single platform. The solution enabled the organization to proactively manage customer experiences, improve policyholder engagement, **strengthen brand trust, accelerate decision-making, and identify opportunities for product innovation and growth.**



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CHALLENGES



The client struggled with:

- Inability to consolidate customer feedback, social conversations, and market discussions into a unified intelligence platform
- Limited visibility into policyholder sentiment and customer experiences across social media, review platforms, and digital channels
- Delayed response to reputation risks and negative customer sentiment impacting brand trust
- Manual analysis of customer feedback and social interactions slowed decision-making and response times
- Limited competitive intelligence regarding customer perceptions of competing insurance providers

SOLUTIONS



ITHENA's iSIP platform improved customer intelligence and engagement by:

1

Unified Customer Intelligence

Aggregated policyholder feedback, brand mentions, reviews, and social conversations across social platforms into a centralized real-time intelligence dashboard

2

AI-Powered Sentiment and Root Cause Analysis

Leveraged AI and NLP to analyze sentiment, identify key drivers behind positive and negative experiences, and monitor policyholder engagement trends in real time

3

Competitive and Market Intelligence

Provided visibility into competitor sentiment and emerging insurance market needs, enabling proactive strategic planning and product differentiation

4

Customer Experience Monitoring

Continuously monitored discussions around claims processing, policy management, and customer service to identify service gaps and improvement opportunities

5

Agentic AI Recommendations

Delivered intelligent recommendations for customer engagement, retention initiatives, marketing campaigns, and CRM workflows, enabling teams to act immediately

6

Audience and Geographic Analytics

Segmented customer sentiment and engagement by region, product line, and demographics to sharpen targeting and service strategies

OPPORTUNITY FOR IMPACT



40%

Reduction in manual feedback & social intelligence analysis

36%

Faster response to customer sentiment

28%

Improvement in digital channel customer engagement

24%

Increase in policyholder satisfaction scores