

Symphony empowers compliance-focused client interactions

Client 1

Delivers business insurance solutions across 130 countries

Enhancing compliance oversight for communications

Challenge

Client 1 required a solution to monitor and track employee-customer conversations to **meet compliance requirements** and detect potential policy breaches in real time. They also needed to automatically notify the compliance officers for timely reviews.

Solution

Symphony deployed SymProxy and the Violation Email Notifier to strengthen compliance oversight. The solution checks policies across messages, room names, hashtags, signals and attachments.

Result

Compliance officers now receive detailed, real-time notifications with a direct link to the conversation, enabling faster response times and reduced risk exposure. This has also improved visibility and coordination between compliance teams.

Client 2

Global enterprise offering life and annuity insurance

Capturing the SMS communication flow

Challenge

Client 2 needed to capture and manage SMS conversations between their wholesalers and customers, as there was no formal record of these interactions, leading to **compliance risks** and a lack of oversight. Wholesalers had to manually search Salesforce, slowing down their response times.

Solution

Symphony implemented its SMS Direct platform to monitor and automatically record all client-wholesaler conversations in real time.

Result

All opted-in client conversations are captured and stored in Salesforce, improving recordkeeping and compliance. Lookups for unknown numbers were automated, improving wholesaler efficiency.

Client 3

USA insurer offering automobile, home, and rental insurance

Improving customer journey analysis

Challenge

Client 3 needed to process hundreds of thousands of customer feedback documents, difficult for standard NLP solutions to handle. They required a solution that remained within their existing **tech infrastructure for security and privacy**.

Solution

Over the last 7 years Symphony has provided a scalable NLP-based solution for processing and understanding the customer journey.

Result

Symphony's model currently processes 25+ different customer surveys with a minimum accuracy of 90%. Tens of thousands of customer survey documents are processed per month.



Book a demo
symphony.com

Learn more symphony.com/solutions/insurance or read our latest ebook on [Why Insurance Giants Are Racing to Harness AI to Reinvent Communication](#)