

SANTALUCÍA creates a Policy Translator based on Generative AI

The insurance company has managed to improve agents' query time by 85%, from 90 seconds to just 13.



A century-old insurance company with a forward-looking vision

Santalucía is one of the most important insurance companies in our country. In 2022, it celebrated its 100th anniversary, has more than 15,000 employees, and offers a portfolio of insurance products in various branches such as Home, Funeral, Life Risk, Savings, and Accident insurance. SANTALUCÍA, a comprehensive insurer with 100 years of history, is the parent company of the SANTALUCÍA GROUP, a provider of protection, savings, and family assistance services. Recognized for being one of the best-rated insurers for customer experience, it offers a comprehensive value proposition that reaches more than 7.4 million policyholders.

As of the end of 2023, the Group has 9,016 employees, a territorial organization of more than 200 agents, 450 points of sale, and collaborates with more than 1,000 brokerage firms. The company is also present in Portugal, Colombia, Mexico, Chile, and Argentina.

In 2020, it began its digital transformation plan, a strategic project whose first phase culminates in 2024, aiming to respond to certain business needs from the technology area. In the next phase, technologies such as Generative AI will play a more prominent role in the company's strategy.*

An organization of this size generates large amounts of information and documentation, both structured and unstructured: claims data, coverages, receipts, procedures, employees, clients, policies, reports, etc.

In this context, the challenge was posed to create a solution to assist the 8,000 agents who serve the insurer's customers using Generative AI. This tool aims to easily and naturally consult policy documents.

Therefore, Policarpo was born, the policy translator that also helps reduce the learning curve for new hires or for products added to the company's offerings.

Santalucía faced a dual challenge: creating a solution that would help its customer service staff and making it scalable and ready for production from the beginning.

With a foundation like the Advanced Analytics Platform deployed in 2020, developing BI and Machine Learning was more straightforward. In this regard, PUE has helped make it productive, collaborating on this use case with the existing architecture, among other challenges, to jointly scale the solution.

Data experts, the driving force of Gen AI in the Company

The entire journey has been based on the Databricks platform, a provider the insurer has been working with since 2018. The company has decided to bet on innovation to become more competitive in information management and to impact the global business.

The advent of Generative AI has opened up a range of possibilities, where the insurer has seen potential to leverage the technology platform and maximize innovation by integrating it into its systems, thereby creating a continuous improvement environment.

"For Databricks, we are a client with an interest in Generative AI and a desire to do it right, making it a trusted partner that helps us discover new paths of innovation and advises us on the business areas where this technology can be effective," says Manuel Valero Méndez, Head of Big Data at Santalucía Seguros.

This collaboration, along with the participation of PUE, which has professionals certified in Databricks technologies, has helped optimize the deployment of the policy translator. It has taken a proof of concept to a real use case that will have a long trajectory in the company, as well as opening the doors to the use of Generative AI in other departments.

“ Generative AI is just at the beginning of its capabilities, and many companies are uncertain about how this technology could benefit them. Working with a leading company like Santalucía, which is clearly committed to digital transformation, has allowed us to leverage the full potential of our knowledge and refine a very powerful tool for an insurer of this caliber. Additionally, it represents the incorporation of the cutting-edge technology stack of PUE in the Data domain.

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Sergio Rodríguez de Guzmán
Chief Technology Officer de PUE

Generative AI reduces agents' query time by up to 85%

Policarpo reduced agents' query time for coverages from an average of 1.5 minutes to just 13 seconds. Additionally, 9 out of 10 agents positively rate the tool after having tried it. The translator also offers responses almost in real-time (under 3 seconds), can handle hundreds of documents, and is available on any device.

Regarding the accuracy of the responses, it has improved from 3.4 out of 5 to over 4 points, thanks to the incorporation of elements such as Azure Cognitive Search and the final step of agent verification, with human-in-the-loop ensuring service quality.

Looking ahead, the company's goal is to scale it to the highest possible level, allowing customers to directly access the Gen AI-based chatbot through tools like WhatsApp.

The company is convinced that this project will enable a significant productivity improvement of up to 20% or 30%, after migrating the solution to OCP and future development in Salesforce for internal use, or in WhatsApp for external use.

“ The collaboration with PUE has been very positive due to their willingness and proactivity in helping to move the project forward, as well as the confidence they have provided us. We highly value the immediate availability of expert and certified professionals who are familiar with current market platforms and are capable of working with technology that can change up to twice in a single day.

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Manuel Valero Méndez
Head of Big Data de Santalucía Seguros

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