

CUSTOMER STORY

# next



700+ Employees



Palo Alto, California



Insurance

 workato

Proprietary & Confidential

# Effectively routing 300+ calls/hr to the right customer service agents.

## PROBLEM

300+ customers/hour need to be routed to the right customer service agents without delays, a challenge that snowballed as call volumes increased.

## SOLUTION

Implement an automation platform to seamlessly orchestrate call center operations and scale with the business.

## IMPACT

- Higher-quality customer service with seamless call center operations tailored to each caller
- Huge amount of saved time/money by automating manual processes, such as employee onboarding or claims processing
- Increased trust in data by ensuring synchronization between systems
- More knowledgeable claims agents by providing relevant customer information at their fingertips
- New employees become productive faster by accelerating employee onboarding
- Cost-effective, secure platform allows Next to scale without processes breaking or huge increases in licensing fees

“Using Workato, it makes processes much easier to automate and it reduces the time that it takes for the IT team to provide solutions to end users.”



**Next**

**Shlomi Shpilman**  
Business Applications Manager

## Create a culture of automation to reap huge efficiency gains.

**Problem:** Inability to quickly match callers with the correct customer service agent increased wait times and threatened Next Insurance's quality of customer service, especially as call volumes increased.

**Solution:** Leverage an automation platform for seamless call center orchestration and prompt service.

Workato sources the exact state that the customer is calling from via Zendesk and then routes the call to the right agent. All call information is stored through Workato for reference.



Workato pulls relevant customer information from Zendesk & packages it into a PDF, which is then uploaded back into Zendesk for the agent's reference.



Workato integrates BambooHR and NetSuite to automate the process of creating new employee profiles, giving employees access to the right applications and sending out notifications.



When an employee changes managers, Workato automatically makes that change in Expensify.



New employees become productive faster.



Huge cost savings on time spent manually updating systems.



Personalized, seamless customer service for claims processing & general inquiries.

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"In the future, we know that [the number of calls] will grow and we wanted a solution that would scale without a need to replace it."

**Shlomi Shpilman**  
Business Applications Manager