PRIES is now running their contact center in the cloud for insurance sales

> ## DFX5 has really helped us create a competitive advantage.

CARLOS MARCHI
President, PRIES

The client

PRIES is a contact center startup specializing in insurance sales for major insurance companies in Puerto Rico, and for the Hispanic market in at least three states. They currently have five licensed insurance agents, with the goal of having over 100 agents in the next six months.

Problem statement/definition

PRIES needed a cloud-based contact center that could be scaled in tune with their growing needs. Their requirements included the capability to integrate with the Salesforce CRM, ability to record calls and route sales calls to a specific licensed agent, a way to identify the caller by doing CRM lookup, and the source of the call—specifically the source sales campaign, product of interest and from which state was the campaign launched by using a database of DIDs. Customer also needed the ability to mask payment details from the call recordings in an automated way. Additionally, the client required a built-in custom-made callback flow.

Proposal

Build a cloud-based contact center using Amazon Connect to minimize all CAPEX and quickly deploy a solution.

1. The implementation of the Amazon Connect CTI Adapter while collaborating with Salesforce Partner to ensure that all worked flawlessly from both sides.
2. Build an audio recording mask library in Java, in Lambda to mute payment sensitive data from the records, thus reducing the PCI scope.
3. Build a custom callback flow that allows customer to enter a phone number or use existing one to get a callback. Instead of automated callbacks, and differently from the default Amazon Connect callback, this custom solution writes callback request into Salesforce and the appropriate agent then calls back when ready to talk to the customer.

Results

The contact center was built quickly and efficiently. DFX5 provided stellar client support and collaboration with Salesforce partner throughout the whole UAT process, and PCI-DSS Certification. The call recording mute logic works great.

Lessons learned

As is usually the case with sales calls, a credit card number is captured by the agent so the sale of insurance can be processed. The client asked for an automated way to remove the credit card number to reduce the scope of PCI compliance. The PCI compliance process turned out to be extremely challenging with many hours spent supporting the PCI consultants. Part of the challenge was having to educate the client on the shared responsibility of security, and while AWS can protect much of the data, the client must also work on protecting it further.

aws solutions	Amazon Connect	DynamoDB	**Third party solutions**	Salesforce CRM via Amazon Connect CTI Adapter
	Amazon Connect CTI Adapter	Kinesis		InFlux Time-Series DB
	Lambda	S3		Grafana Dashboard