

# Building a Next-Generation Outbound & Callback Ecosystem for a Leading US Life Insurer

How ABSYZ engineered a unified Salesforce ↔ Genesys platform powering Sales, Retention & Service at scale.



## Strategic Context

Life insurance operations demand precision; live connections, zero missed callbacks, licensed-agent routing, and fully compliant engagement.

Our customer, a leading life insurance provider, needed a modernized, high-volume outbound engine that could unify Salesforce campaigns, Genesys dialer intelligence, and dynamic routing across three business units.

## The Stakes

Why this transformation mattered:

High-volume sales & renewal cycles with strict timelines

Need for zero leakage across callbacks & follow-ups



Compliance-sensitive conversations needing licensed agent routing



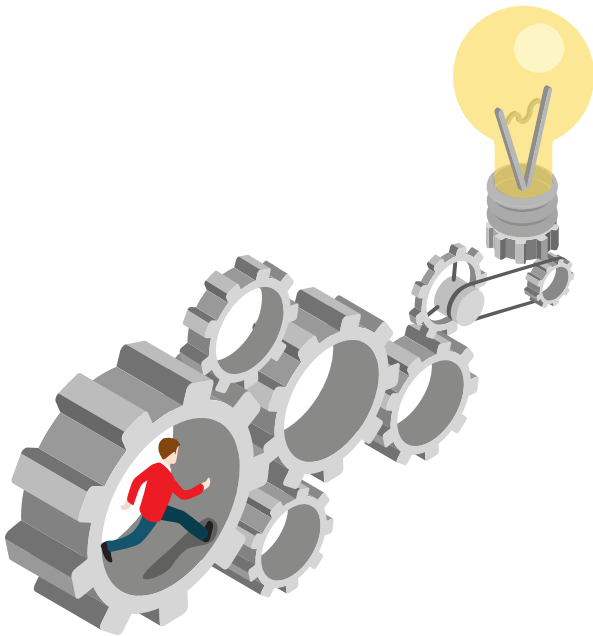
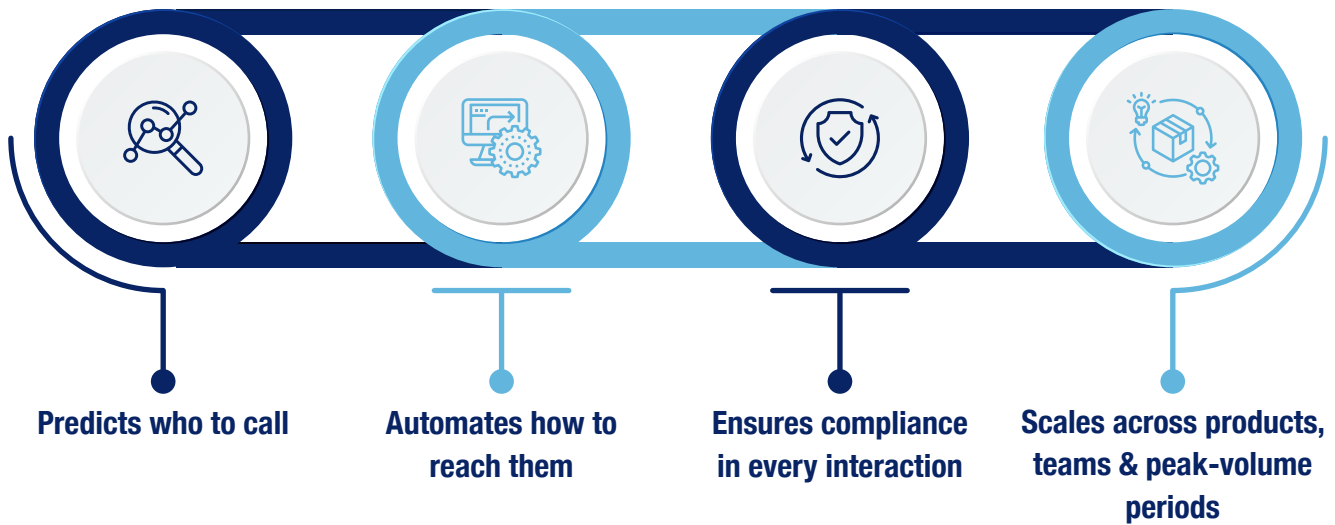
Complex policy lifecycle communications



Multiple business units with diverse outreach strategies

# What Needed to Change

The process needed to evolve from manual, siloed outreach to a fully orchestrated, data-driven engagement engine that:



## THE ENGINE WE BUILT & THE IMPACT IT CREATED

### The ABSYZ Engine

**We engineered a multi-layer outbound ecosystem:**

- Unified Salesforce → Genesys campaign orchestration
- Progressive & Preview dialing across three business units
- Zero-leakage callback orchestration
- Skill, license & compliance-based routing
- Intelligent outbound flows, rules & attempt controls
- Daily refresh, retry logic & fault-tolerant sync layer
- Unified wrap-up code synchronization for analytics

Before Transformation	After Transformation
Manual dialing, low connect rates	Agents handle only live, connected calls
Missed callbacks & follow-up failures	100% callback adherence across units
Routing inconsistencies & compliance gaps	Compliance-first routing to licensed agents
No unified view across systems	High-volume, automated outbound cycles
Fragmented operations across Sales, Retention, and Inbound	Unified Salesforce + Genesys operational visibility

# The Impact

The process needed to evolve from manual, siloed outreach to a fully orchestrated, data-driven engagement engine that:



## Precision at Scale

High-volume campaigns run with automated syncs, retries, refreshes & compliance-led routing.



## Commercial Lift

Increased contact rates and higher-quality interactions drive measurable uplift across Life, Whole, Universal & Annuity products.



## Compliance Strengthened

Licensed-agent routing ensures regulatory adherence across every outbound & callback conversation.



## Operational Excellence

Zero leakage, automated callbacks, unified wrap-up syncing, and dialer precision across all teams.

## Why This Engagement Sets a Benchmark

This project redefines what's possible for insurers aiming to unify CRM intelligence and contact center precision. ABSYZ delivered a multi-system, multi-unit, compliance-critical transformation with engineering depth, operational rigor, and a scalable architecture, making it a standout benchmark for enterprise outbound modernization.

**Transform your outbound,  
retention & service operations  
with enterprise-grade precision.**

