



## CASE STUDY

# AUTOMATING GENAI WORKFLOWS IN A DIGITAL SALES PLATFORM TO IMPROVE EFFICIENCY, SCALABILITY, AND USER EXPERIENCE

**GenAI-led automation to accelerate configuration, digitization, and standardization**



# About the Client

The client is a leading U.S.-based insurance technology provider delivering digital sales automation solutions for the life insurance and annuities ecosystem through its flagship digital sales platform. The platform enables carriers and distributors to digitize and orchestrate end-to-end sales journeys with configurable workflows, business rules, and modern user experiences that support in-good-order submissions and regulatory compliance requirements.



## Client Requirements

As the insurance industry moves toward providing more digital-first sales experiences, this client wanted to modernize and scale critical configuration workflows within its flagship platform. This would help eliminate operational bottlenecks, improve speed to market for carriers while also enhancing experiences for insurance agents and all enterprise users, as well as providing measurable progress at a major industry conference to stakeholders in September 2025.

The client anticipated to automate high-effort, manual processes that were restricting scalability due to the limitations of creating onboarding and configuration cycles. The following were the primary challenges faced:

Reducing the effort and turnaround time required to create and maintain complex business rules within the platform.

Improving the accuracy and consistency of data-element mapping by aligning client-specific data elements to standardized system tags.

Accelerating the conversion of carrier PDF forms into JSON-based digital forms and guided wizard experiences.

Enabling these capabilities through scalable, API-led services with governance guardrails for seamless platform integration.



# Happiest Minds Solution

Happiest Minds has created an innovative Agile POD team for the purpose of designing and developing GenAI-driven automation features for selected platform processes. The engagement combines business process knowledge with AI-based engineering to help the client increase operational efficiency and build the foundation for platform scalability.

The solution uses Azure OpenAI models from the GPT-4o family, as well as lightweight versions of those models as reasonable, to support prompt-driven orchestration, structured outputs, and guardrails for generating recommendations that can be easily integrated into the client's platform experiences.

## GenAI-Powered Rule Builder (Natural Language → Rules)

Key capabilities include:

Natural language-based rule creation with guided follow-up prompts to capture missing inputs and edge cases.

Guardrailed generation of rule logic aligned with platform syntax, constraints, and governance standards.

API-first delivery model to enable seamless integration into existing admin and configuration workflows.

This capability helps reduce configuration complexity, improves turnaround times, and enables faster onboarding of carrier-specific workflows.

## Automated Data-Element Mapping (Common Tag Recommendation)

Key capabilities include:

Automated mapping of client-specific data elements to standardized Common System Tags.

User-in-the-loop recommendations that allow business users to validate and finalize mappings for improved

Consumable APIs that integrate directly into existing mapping workflows.

This approach improves standardization across implementations while significantly reducing manual mapping effort.

# PDF-to-Digital and Wizard Form Generation

To accelerate digitization initiatives, Happiest Minds developed GenAI-powered capabilities that convert carrier PDF forms into structured JSON-based digital forms and interactive wizard flows.

Key capabilities include:

Automated PDF field detection to identify data-entry fields and associated metadata.

Intelligent mapping of detected fields to system-defined elements to improve downstream validation and processing.

API outputs that support programmatic creation and updates of digital forms and wizard experiences within the platform.

This enables faster digitization of carrier forms while improving the overall agent and customer experience.

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# One-Team Delivery and Platform Integration

Happiest Minds and the client operated through a collaborative one-team delivery model designed to accelerate innovation and ensure rapid business outcomes.

Key aspects of delivery included:

Dedicated Agile POD execution with two-week sprints, iterative demos, and prioritized use-case delivery.

Parallel development of multiple GenAI capabilities based on business priorities and platform readiness.

Iterative delivery of workshops, solution architecture, technical design, test assets, source code, demos, and release notes.

Clear ownership boundaries where Happiest Minds developed reusable APIs and the client integrated them into the platform experience.

This collaborative approach enabled faster time-to-demo while aligning innovation milestones with the client's conference roadmap.

# Value Delivered

The implementation is progressing as planned and is designed to deliver measurable operational and business impact across the client's digital sales ecosystem.



## Faster Configuration Cycles

Natural language-driven rule minimizes manual work and build rule creation and maintenance for carrier administrators, growing operational agility.



## High Standardization Across Implementations

Automated common tag recommendations help standardize data mapping across products and carrier ecosystems, improving consistency and governance.



## Increased Digitization Throughput

Automated PDF-to-digital conversion significantly lowers the workload required to build digital forms and wizard-based experiences, bringing faster onboarding and deployment.



## Rapid AI-Driven Platform Modernization

The API-led architecture allows the client to embed GenAI capabilities into the platform while maintaining governance, flexibility, and platform-level control.



## Increased Innovation Readiness

Sprint-based execution, continuous demos and iterative delivery tailors visible progress toward the client's September 2025 industry showcase and broader digital transformation goals.

## About Happiest Minds

Happiest Minds Technologies Limited (BSE, NSE: HAPSTMNDS) is an AI First, customer-centric digital engineering company committed to delivering 'Happiest People . Happiest Customers'. With an integrated approach that spans from chip to cloud, Happiest Minds delivers secure and scalable solutions across product engineering, cybersecurity, analytics, and automation platforms. Happiest Minds brings purpose and precision to every engagement, helping enterprises solve complex business challenges and fast-track their digital evolution across industry sectors such as Banking, Financial Services & Insurance (BFSI), EdTech, Healthcare & Life Sciences, Hi-Tech and Media & Entertainment, Industrial, Manufacturing, Energy & Utilities, and Retail, CPG & Logistics.

Happiest Minds has been honored by both the Golden Peacock Awards and the Institute of Company Secretaries of India (ICSI) for its exemplary Corporate Governance practices. Guided by its mission of 'Happiest People . Happiest Customers' and consistently recognized as a great place to work, Happiest Minds is headquartered in Bengaluru, India, with a global presence across the Americas, UK, Europe, Australia, the Middle East, Africa, and Asia.

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