

Case Study

# Maximizing insurance sales performance with data modernization

Boosting sales efficiency with customer insights



**Atos**



# At a glance

Atos helped a leading mutual insurance holding company to build a cloud-based customer 360 platform and improved lead scoring by using AI/ML techniques.

## Outcomes

- 18% increase in sales achieved over target
- 20-30% improvement in lead conversion rate
- 20% improved agent performance
- Deep insights and collaboration

## Overview

The client is a US-based mutual insurance holding company. Through its subsidiaries, the company offers commercial and personal insurance products, retirement plans, lending, and payment security solutions, and investment and marketing services to credit unions and their members.

## Why Atos

Atos's Data and Analytics practice empowers enterprises to transform into data-centric organizations. With our end-to-end data modernization services, customers can plan, design and build a cloud-based scalable, secure data foundation and unified governance model for advanced analytics and generative AI use cases at scale.

Learn more about Atos's Data & AI services and how we are helping enterprises transform into data-centric businesses: <https://atos.net/en/services/data-and-ai>

# Challenge

## Enabling end-users

The mutual insurance holding company has witnessed a multi-fold growth in customer data in 5 years due to a large increase in memberships. However, they were struggling to manage the spurt in volumes, leading to a drop in performance and scalability. Additionally, the teams were facing latency and concurrency challenges with the on-premise data platform.

Sales and marketing teams needed qualified leads to optimize their sales efforts, and their business leaders needed insights to help them improve customer service. Several end-users needed a self-service interface and reporting capabilities to derive insights from data scattered across multiple sources.



# Business benefits

## Achieving customer centricity and enabling self-service

With Atos's solution, the client now has faster insights to customer behavior at its fingertips. This has improved the lead conversion ratio by 10% year on year and reduced the total cost of ownership. With its business and IT teams aligned on the enterprise data strategy, and with better data and analytics operating and governance models in place, the client is set to transform its strategy.

# Solution

## Charting a transformative roadmap

Atos conducted a business and technology assessment and proposed a multi-year strategic data modernization roadmap that included the following projects:

- Tools selection and infrastructure readiness
- Data modernization execution roadmap
- An Agile data factory model implementation to deliver quick wins and iterative improvements
- Operations support maintenance and upkeep

In line with this assessment, the client and Atos jointly zeroed in on a customer 360 data modernization journey on Azure and Snowflake.

## Delivering a cloud-based modern data platform

The target state architecture was designed to be open and loosely coupled to keep it ready and scalable for future use cases. Key highlights of Atos's solution are as follows:

- A data lake on Azure platform and the Customer 360 solution on Snowflake to get a consolidated view of the customer
- A data fabric to integrate data from the marketing cloud, sales agents forecast system and operations, and customer Master Data Management (MDM)
- Lead generation and scoring model with more than 126 parameters on Azure ML
- A customer experience portal with an integrated customer view for the sales and service teams



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