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Salesforce and AI: A Game-Changer for Workflow Efficiency in Healthcare and Insurance

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Even in the most dynamic areas such as healthcare or insurance, where customer experience and efficiency are on the line, legacy processes often can't deal with the challenges of identity authentication and integration. In this article, we look at the opportunity to merge Salesforce Vlocity elements — FlexCards and OmniScripts — with AI to completely redefine service integration for healthcare and insurance customers. When we pair third-party services such as ID.me with Salesforce's ecosystem, we show how AI-enabled enhancements automate identity verification, data collection and regulatory compliance. This integration reduces manual steps from days to minutes, making data more accurate, errors less common, and customer satisfaction higher. We also recommend Salesforce Einstein for predictive analytics, fraud prevention, and UX/Personalization with specialized reporting through Tableau CRM. They provide the means for scalable, secure and intelligent workflows that change the way medical and insurance industries work. What we have observed is that AI-enabled Salesforce solutions have tremendous opportunity to address the changing needs of these industries by providing seamless, compliant and customer-centric services.