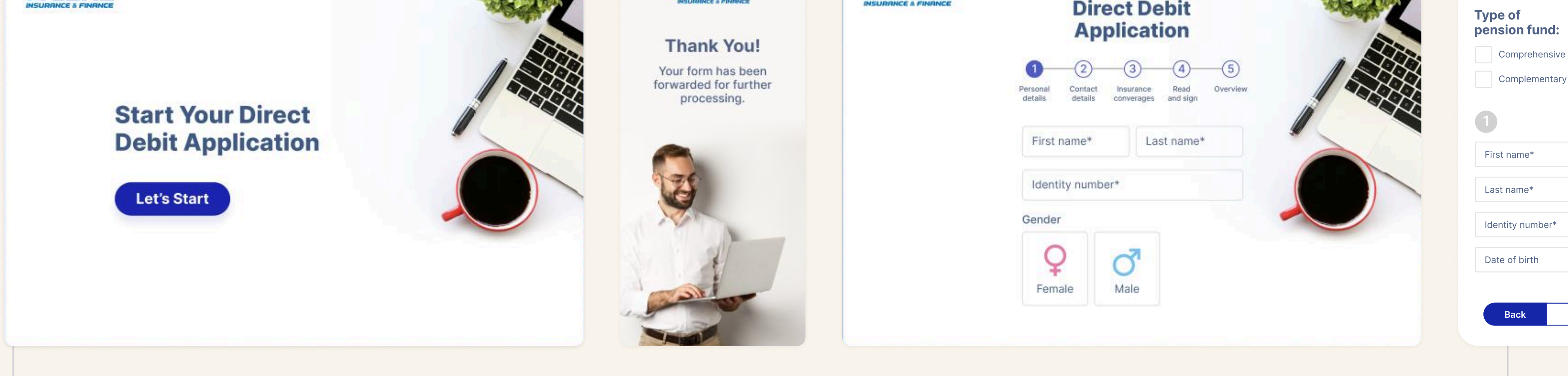


Customer story • Clal

Quality at scale: Digitizing 200+ processes

Insurance customers want immediate service
—anywhere and anytime.



Clal created 75 digital processes in just one year with EasySend, going to market fast and efficiently. Today, they have over 200 journeys, streamlining the customer experience with fast self-service any time of the day.

221%

uplift in customer adoption

350,000+

yearly transactions

60-80%

process conversion rate

80%

faster time to market



Elad Shachuch
Withdrawals
Department Manager
at Clal Insurance

“Any digital process that I can dream of, EasySend can make happen. EasySend is a tool to improve customer experience and shorten our SLA.”

About

Clal Insurance & Finance

Clal Insurance Enterprises Holdings is a leading insurance and long-term savings group in Israel. It offers a range of services and products to private and business customers. The group employs around 4,500 people and works with 3,700 insurance agents. It is a publicly traded company on the Tel Aviv Stock Exchange.

Industry

Insurance

Employing

4,500

Lines of business

- Non-Life Insurance
- Health Insurance
- Financial Savings
- Credit Insurance
- Long-Term Saving
- Life Insurance
- Pension & Provident products

Mission

Improve customer service & optimize operations

Clal had a vision: Save dev resources and create self-service success. This meant finding a solution that involved little to no code so they could go to market fast, react quickly to market demands, and be available wherever customers needed them.

Core desires

- Tackle their customer pain points
- Offer self service
- Reduce development resources
- Integrate processes with business software
- Go to market faster
- Scale at speed

Solution

Building end-to-end digital journeys

A faster go-to-market plan

By reducing dev resources with EasySend's no-code platform, Clal built branded digital processes in days instead of months. With such a fast go-to-market workflow, they were able to save valuable resources while offering more services that feel digitally native.

Working more efficiently

Clal uses integrations to launch digital processes in various ways —with or without agents. By removing the manual PDF scanning steps and using logic and pre-filled data to avoid mistakes, Clal receives and processes digital requests faster and with less back and forth.

Reusing journeys to scale at speed

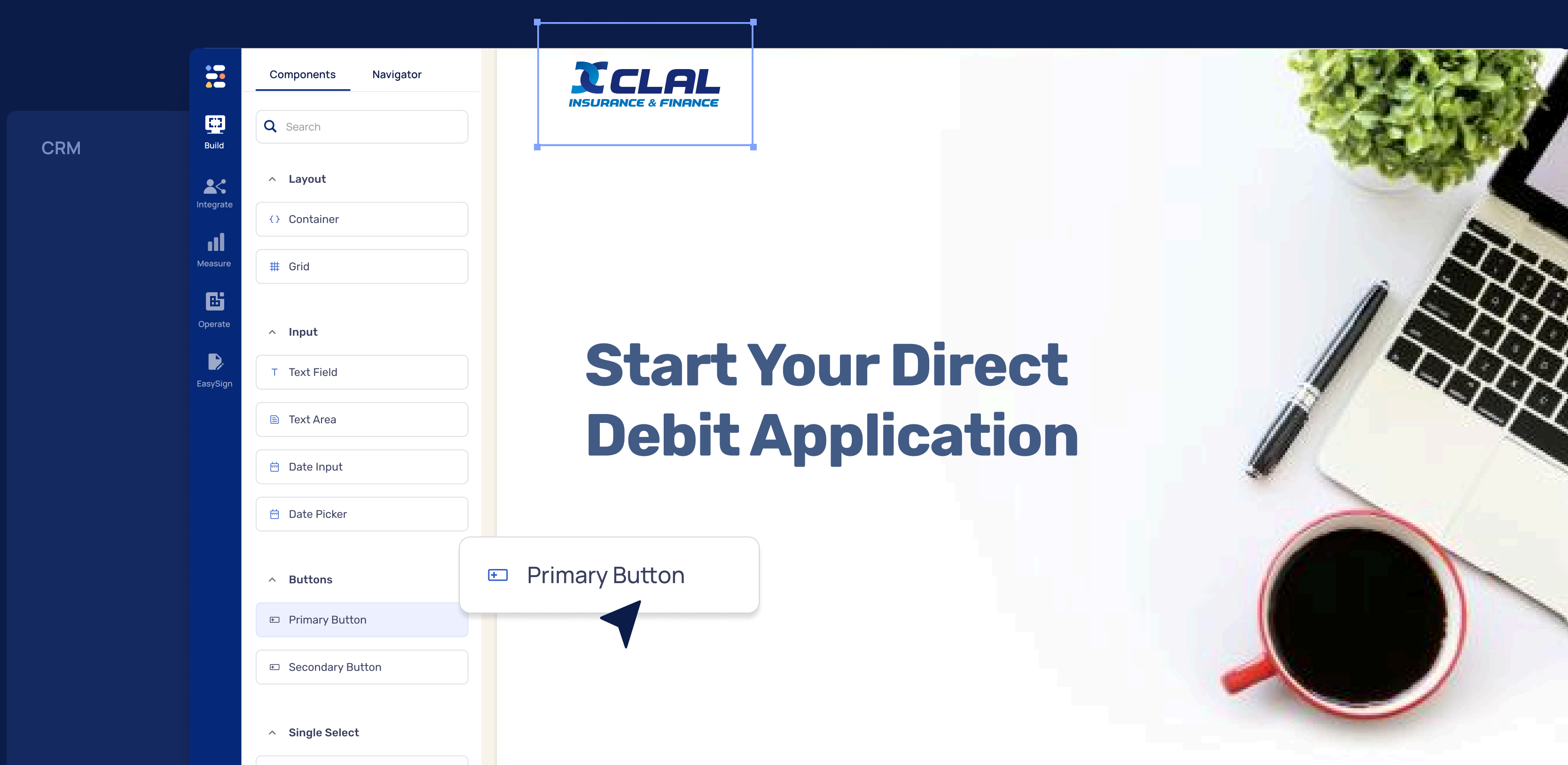
Since Clal builds multiple processes from the same base, they speed up production to six hours. Using XML (Extensible Markup Language), they use the same journey in different places, quickly and easily building new journeys with little time and effort.

Syncing data automatically with integrations

Through EasySend integrations, Clal launches 85% of its digital processes from its CRM. This allows them to personalize each form with prefilled data, creating a better customer experience. Once the form is submitted, the data is automatically collected and synced with their business systems.

Reducing manual work & errors

In insurance, it's common to receive forms with missing details or typos. Since EasySend is connected to five core systems inside Clal, their Collective department can immediately see what's missing, like bank details, confirmations, and claim amounts, and send an automated request to collect the missing info, reducing processing delays.



Partners since 2017

EasySend made it simple for Clal to achieve digital transformation with fast and simple processes that are easy to duplicate and reuse. Today, they have 200+ digital processes with many integrations to support launching forms, submitting details, and processing payments. Now, their customers can request Health Questionnaires, Money Transfers, and Pensions, and Claims from the comfort of their homes.



Security you can rely on

We're dedicated to keeping your data secure with enterprise-grade security standards. Our platform and electronic signature tool comply with the highest international standards, including GDPR, SOC 2, ISO 27001, PCI DSS, and HIPAA compliance.



About EasySend

EasySend is the missing layer to limitless self-service.

Our AI-powered digital platform makes it easy to plan, create, and manage personalized customer interactions across every channel, seamlessly connected to your business software. With our low-code suite of products —Journeys, DynamicDoc, EasySign, and Workflow Manager— you go beyond traditional forms to deliver thoughtful, dynamic, and efficient experiences that go far beyond traditional forms.

[Learn more](#)