



# Vipin Maheshwary

Product Design Director

*Leading enterprise AI transformation through human-centered agentic experience design*

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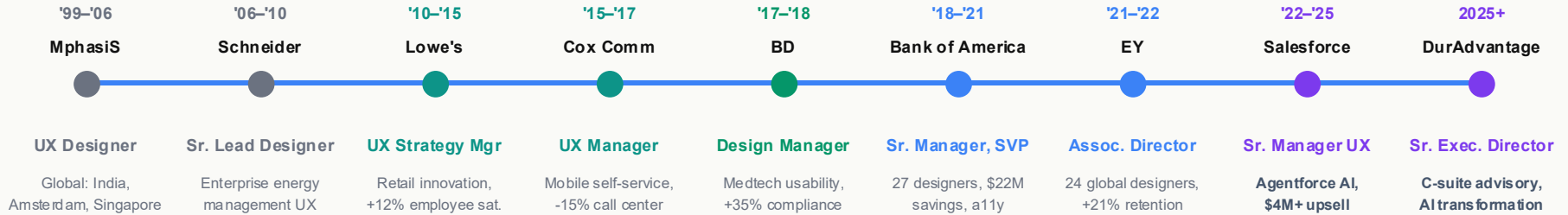
## CASE STUDY

LWCC: Transforming a 40-Year Legacy System into an AI-Powered Agentic Claims Platform

Agentforce AI · Conversational AI · Autonomous Agents · Trust Design · Salesforce Financial Services Cloud

ABOUT ME

# 20+ Years Designing at the Intersection of Enterprise Scale and AI Transformation



FOUNDATIONS

ENTERPRISE SCALE

AI TRANSFORMATION

From global UX delivery across 4 continents to building design organizations at Fortune 100 companies. Now focused on AI-native enterprise design — conversational AI, autonomous agents, and trust frameworks.

MBA · Salesforce 4X · ChatGPT Expert · Design Thinking (Luma) · CSM / CSPO / CAL1 · CUA · HCI Diploma

3 Fortune 100

24+ Designers

\$22M Savings

\$4M+ Revenue

1,500+ Trained

88% A11y

# What | Why | How | When

A human-centered lens for designing AI-native enterprise experiences that earn trust

## HUMAN LENS

## AI + AGENTIC LENS



WHAT

**What they do**

Understand the user's actual task — not the AI feature

**Design for the job-to-be-done: AI invisible when working well**



WHY

**Why they do it**

The intent and motivation behind every action and decision

**Explainability & trust — users and AI must share intent**



HOW

**How they do it**

Workflows, tools, and mental models that shape behavior

**Human-agent collaboration — who controls what, where handoffs**



WHEN

**When they do it**

Context, timing, urgency, and environment

**Proactive vs. reactive — when agents act autonomously vs. defer**

# Designing How Humans and AI Agents Work Together

Employees and customers interact with two distinct AI patterns — each requires different design

## CONVERSATIONAL AI

*Human-initiated, dialogue-driven*

- Natural language claims intake and guidance
- Context-aware Q&A with domain knowledge
- Progressive disclosure — ask only what's needed
- Empathetic tone calibrated to emotional state
- Seamless handoff when confidence drops

## AUTONOMOUS AI AGENTS

*System-initiated, action-driven*

- Automated document extraction + classification
- Intelligent case routing with confidence scoring
- Predictive fraud detection and risk flagging
- Proactive notifications based on claim lifecycle
- Escalation to human with full context

*The best AI experiences make the agent's boundaries explicit — users always know when they're talking to AI.*

## THE CHALLENGE

# Louisiana Workers' Compensation Corporation (LWCC)

Replacing a 40-year mainframe with Visual Basic UI with an AI-powered agentic claims platform serving adjusters, policyholders, and agents.



### LEGACY SYSTEM

40-year mainframe  
with Visual Basic UI



### AI PLATFORM

Salesforce FSC +  
Agentforce AI



### MY ROLE

UX Lead — Strategy,  
Architecture & Screens



### TEAM

Cross-functional  
team of 15



## Claims Adjuster

*"I know the system's quirks by heart — but I shouldn't have to."*

### AVG. EXPERIENCE

15+ years with legacy system

### DAILY CASELOAD

35–50 claims per day

### SYSTEMS USED

6+ VB screens per claim

### DATA RE-ENTRY

~40% of time re-keying data

### ERROR RATE

12% manual entry errors

### AI READINESS

Wants automation, skeptical of black-box AI

## PAIN SEVERITY

toggling between 6+ screens per claim

Critical

Re-keying same data across systems

Critical

No unified view of claim history

High

Fraud detection is entirely manual

High

No AI assistance for decision-making

Medium

### WORKFLOW

Open claim → Re-key → Check 3 systems → Manual notes → Submit → Wait for routing



## Injured Worker

*"I just want to know if my claim is being handled.  
Nobody tells me anything."*

### TYPICAL PROFILE

Blue-collar, construction/industrial

### TECH COMFORT

Low to moderate — mobile-first

### CLAIM FREQUENCY

First-time filer in most cases

### PRIMARY CHANNEL

Phone calls (avg. 3–5 per claim)

### AVG. WAIT TIME

3+ weeks for status update

### AI EXPECTATION

Instant answers — like texting a friend

## PAIN SEVERITY

Zero self-service claim visibility

Critical

Every interaction requires a phone call

Critical

No digital document submission

High

Unclear next steps after filing

High

Anxiety from weeks of silence

High

### EMOTIONAL JOURNEY

Injury → Confusion → Phone tag → Frustration → Distrust → Disengagement
















# Current-State Journey Map

Three user groups, one broken experience — zero AI augmentation

Claims Adjuster

Injured Worker

Agent / Broker

	Claim Submission	Triage & Routing	Investigation & Processing	Decision & Resolution	Renewal & Follow-up
Claims Adjuster	 Manual data entry from fax / email	 Route claims by gut feeling	 Toggle 6+ VB screens per claim	 Handwrite notes, re-key decisions	 No proactive alerts on renewals
Injured Worker	 Paper forms or phone calls only	 No visibility into what happens next	 Call repeatedly for status updates	 Unclear decision communication	 No self-service portal access
Agent / Broker	 Fax documents, no confirmation	 No real-time tracking	 Email chains for every question	 Manual follow-up required	 Renewal data scattered

# Four Systemic Failures

Not UI issues — structural failures requiring AI-powered service design transformation

## 01 **Fragmented Adjuster Workflow**

6+ VB screens per claim, ~40% time on data re-entry. No AI for routing, fraud detection, or decision support.

## 02 **Zero Policyholder Self-Service**

Every interaction requires phone/fax. No conversational AI intake, no real-time status, no digital docs.

## 03 **Agents Operating Blind**

Fax submissions, no confirmation or tracking. No AI-powered updates or predictive renewal insights.

## 04 **Frozen Infrastructure**

40-year mainframe blocks AI integration. Any change requires months of development.

**THE REFRAME:** This wasn't a UI refresh — it was a full-service design transformation around AI-augmented human judgment.

## THE OPPORTUNITY

# How do we redesign the entire claims experience around AI-augmented human judgment?



### Unify Fragmented Workflows

Consolidate 6+ legacy screens into one AI-powered unified surface — reducing re entry, errors, and context switching for adjusters.



### Real-Time AI-Driven Visibility

Give every user group — adjusters, workers, agents — live, contextual updates powered by autonomous AI agents.



### Augment Human Judgment

Deploy explainable AI agents that recommend, score, and route — while keeping humans firmly in control of final decisions.



# Philosophy Applied: LWCC

Each lens produced a different AI design question — and a specific design decision

	THE ASK	AI + AGENTIC SOLUTION
<b>WHAT</b>  What are adjusters doing?	Not adjudicating — hunting data across 6 screens.	<b>Unified AI-powered workspace.</b>
<b>WHY</b>  Why do workers call 3–5 times?	Zero visibility. Each call = anxiety about livelihood.	<b>Real-time AI status + proactive agents.</b>
<b>HOW</b>  How should AI assist vs. decide?	Co-pilot, not autopilot. Trust requires transparency.	<b>Human-in-the-loop + explainability.</b>
<b>WHEN</b>  When should agents act proactively?	After submission, during investigation, at decisions.	<b>Context-aware autonomous agents.</b>

# Discovery & Research

Leading research to surface structural problems and AI integration opportunities



12

## Stakeholder Interviews

12 sessions with C-suite and frontline — strategic priorities and AI readiness



40 hrs

## Workflow Shadowing

40 hours observing adjusters in legacy VB — documenting every workaround



23

## Service Mapping

End-to-end claims lifecycle, 23 handoffs, 9 failure modes across all users



6 mo

## Data Analysis

Call center logs, processing times, error rates — quantifying cost of status quo



3 tiers

## AI Readiness Assessment

Classified processes: automate, augment, or human-only with confidence thresholds



Gate

## Compliance Review

Medical data governance, AI decision auditability, regulatory constraints mapped

# Future-State Journey Map

AI-augmented experience with conversational and autonomous agents at every stage

	Claim Submission	Triage & Routing	Investigation & Processing	Decision & Resolution	Renewal & Follow-up
Claims Adjuster	<p>✓</p> <p>AI extracts data automatically</p>	<p>✓</p> <p>Smart routing + confidence scores</p>	<p>✓</p> <p>Unified workspace all data, one screen</p>	<p>✓</p> <p>AI recommendation + human override</p>	<p>✓</p> <p>Proactive renewal alerts via agents</p>
Injured Worker	<p>✓</p> <p>Conversational AI claims intake</p>	<p>✓</p> <p>Real-time status from AI agents</p>	<p>✓</p> <p>Self-service docs + AI chat support</p>	<p>✓</p> <p>AI-drafted decision with next steps</p>	<p>✓</p> <p>Digital portal for ongoing management</p>
Agent / Broker	<p>✓</p> <p>Digital submission instant AI confirm</p>	<p>✓</p> <p>Real-time tracking via agent dashboard</p>	<p>✓</p> <p>Agentforce for instant answers</p>	<p>✓</p> <p>Automated status notifications</p>	<p>✓</p> <p>AI-powered renewal pipeline forecasting</p>

# Human-Agent Collaboration Model

Where autonomous AI agents act, where they assist, and where humans decide



## CLAIM LIFECYCLE FLOW



# Designing Employee & Customer Interactions with AI Agents



## EMPLOYEES (Claims Adjusters)

### AI-POWERED TOOLS

Unified workspace with AI-prioritized queue, auto-populated data, one-click actions

### AUTOMATED WORKFLOWS

Document extraction, case routing, notification dispatch — handled by autonomous agents

### AI-DRIVEN INSIGHTS

Fraud risk scoring, similar case matching, confidence-weighted recommendations

### DECISION SUPPORT

Explainability panels showing AI reasoning, frictionless override with feedback loops



## CUSTOMERS (Injured Workers)

### CONVERSATIONAL AI INTAKE

Natural language claims filing — AI extracts data, confirms details, routes intelligently

### AUTONOMOUS STATUS AGENTS

Proactive notifications at every lifecycle stage — replacing 3-5 phone calls per claim

### AI-DRIVEN SELF-SERVICE

24/7 chatbot for questions, document upload, next-step guidance — mobile-first

### TRUST-FIRST COMMUNICATION

AI-drafted decision summaries with rationale — empathetic tone for distressed users

*AI should amplify human expertise for employees and reduce anxiety for customers — never the reverse.*

# Trust & Transparency Framework

Designing AI that earns trust in a regulated, high-stakes environment



## Explainability

*Every AI decision shows its reasoning*

- Confidence scores on every recommendation
- Data points listed alongside decisions
- Risk factors with severity indicators
- Historical claim comparisons shown
- Audit trail preserved for compliance



## Human Override

*The human always has the final word*

- One-click override on any recommendation
- Structured reason capture when overriding
- No penalty or friction for disagreeing
- Override patterns improve AI models
- Escalation paths for edge cases

*Workers' comp involves sensitive medical data and regulatory oversight— trust design is foundational, not optional.*

# AI Governance, Compliance & Enterprise Security

*My framework for responsible AI design — proven at LWCC*



## Data Governance

- Medical data encryption at rest and in transit
- Role-based access controls for claim data
- PII masking in AI training datasets
- Retention policies aligned with regulation



## AI Decision Auditability

- Complete audit trail for every AI recommendation
- Explainability captures reasoning for compliance
- Override logs with structured rationale
- Regular model bias audits and fairness checks



## Enterprise Security

- Salesforce Shield field-level encryption
- SOC 2 compliance across all AI touchpoints
- Multi-factor authentication for adjuster portal
- Secure API between AI agents and data model



## Regulatory Compliance

- State workers' comp regulatory alignment
- AI transparency for claims decisions
- Consumer data rights (access, correction, deletion)
- Human-in-the-loop for all final adjudications

# Before & After

**BEFORE — Legacy VB on Mainframe**

LWCC Claims Processing System v2.1

Claimant Name:

SSN:

Date of Injury:


Employer:

Policy #:

Claim Type:

Description:

**AFTER — Salesforce + Agentforce AI**


Agentforce Claims Workspace 

**CLM-2024-0847 • Active • AI Confidence: 94%**

John Martinez — Workplace injury — Auto-routed by Agentforce

**AI INSIGHTS**

Fraud Risk: 0.12 (Low) | Similar Claims: 847 resolved  
Recommended: Standard processing track

 **Agentforce Assistant**

*"This claim matches standard processing.  
Shall I prepare the initial assessment?"*

# Experience Architecture

Three portals, one AI agent layer, unified data model



AGENTFORCE AI LAYER — Conversational AI · Autonomous Agents · Routing · Fraud Detection · Predictive Analytics

## Claims Adjuster Portal

Salesforce Lightning

- AI-powered unified workspace
- Autonomous queue management
- Fraud detection + override
- Explainability dashboard
- Agent collaboration tools

## Policyholder Portal

Experience Cloud

- Conversational AI intake
- Real-time agent tracking
- Document upload + AI chat
- AI-powered FAQ chatbot
- Mobile-responsive design

## Agent / Broker Portal

Partner Community

- Digital claim submission
- AI tracking dashboard
- Client portfolio overview
- Autonomous renewal pipeline
- Agentforce Q&A assistant

SALESFORCE FINANCIAL SERVICES CLOUD — Unified Data Model · Claims · Policies · Contacts · Documents · AI Model Registry

# AI-Powered Claims Adjuster Workspace

Unified surface replacing 6 legacy VB screens — AI-prioritized, explainable, overridable

Claims Workspace | Queue | Analytics | AI Settings



## AI-PRIORITIZED QUEUE

<b>CLM-0847</b> Risk: High	94%
<b>CLM-0851</b> Risk: Med	87%
<b>CLM-0853</b> Risk: Low	96%
<b>CLM-0858</b> Risk: Low	91%
<b>CLM-0862</b> Risk: Med	82%

## CLAIM DETAIL — CLM-2024-0847

Claimant

**John Martinez**

Injury

**Workplace — Back**

Filed

**Oct 15, 2024**

Employer

**Gulf Coast Construction**

Policy

**WC-2024-11847**

AI Route

**Standard Track (94%)**

### AGENTFORCE INSIGHTS

Fraud Risk: 0.12 (Low) | Similar Claims: 847 | Recommended: Standard  
Confidence: 94% — injury type, employer history, claim pattern

Accept AI

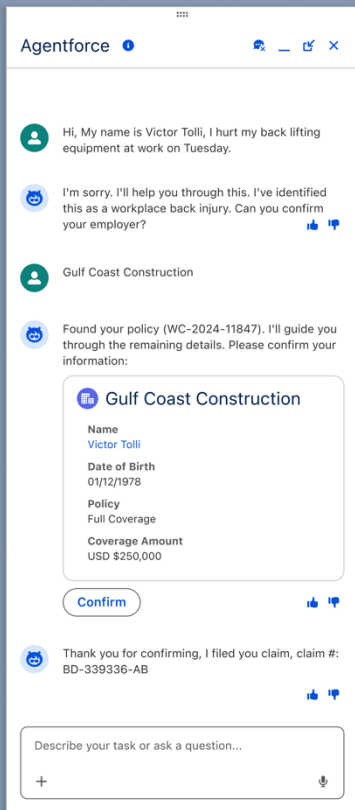
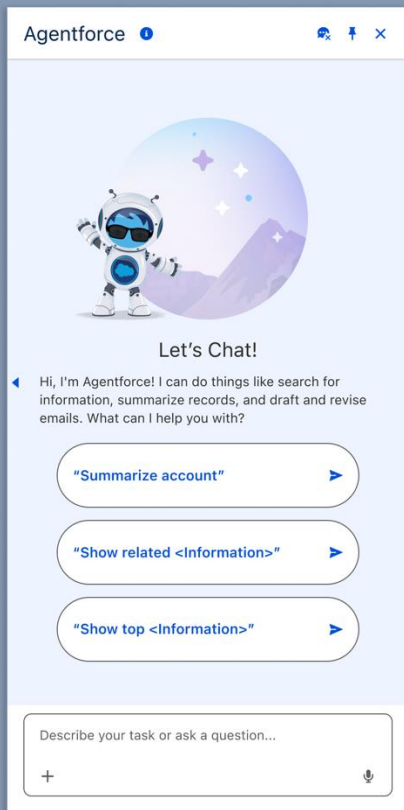
Override

Escalate

AI-prioritized queue · Confidence scores · Override one click · All data one surface · Agentforce insights inline

# Conversational AI Claims Intake

Agentforce guides injured workers through filing via natural language



## KEY DESIGN DECISIONS

### Natural Language First

No forms — AI extracts structured data from conversation

### Progressive Disclosure

Only ask what's needed. Policy lookup is automatic.

### Empathy in AI Voice

AI acknowledges situation before data collection

### Document Upload Inline

Medical docs uploaded mid-conversation

### Mobile-First Design

Many injured workers file from ERs on their phones

### Human Handoff

Seamless escalation when AI confidence drops below threshold

# AI Decision Explainability Panel

Showing adjusters why the AI agent decided what it decided — trust through transparency

## AI Decision Explainability — CLM-2024-0847

### ROUTING DECISION

#### Standard Processing Track



Confidence: 94%

### FACTORS CONSIDERED

<b>Injury Type</b>	Back injury — workplace	High
<b>Employer History</b>	Gulf Coast — 12 prior, 0 fraud	High
<b>Claim Pattern</b>	Matches 847 similar resolved	Medium
<b>Fraud Score</b>	0.12 — Below threshold	Low risk
<b>Medical Docs</b>	ER report — consistent	Confirmed

### ADJUSTER ACTIONS

Accept Override Flag

### SIMILAR CLAIMS

<b>CLM-0412</b>	Approved — 14 days	96%
<b>CLM-0389</b>	Approved — 11 days	93%
<b>CLM-0501</b>	Approved — 18 days	91%

*Override patterns fed back to improve AI accuracy — continuous learning loop.*

Full transparency · Similar claims · Frictionless override · Feedback loop · Audit-ready

# Policyholder Self-Service Portal

AI-powered self-service replacing 'call and wait' with real-time autonomous agent visibility

LWCC | My Claims | Documents | Help

## Welcome back, John

CLAIM STATUS — CLM-2024-0847



Under investigation. Adjuster reviewing medical docs. Est. 5–7 business days.


### QUICK ACTIONS

 Upload Documents

 Chat with AI Agent

 View Next Steps

 Contact Adjuster

 Need help? Ask me anything about your claim.

Visual tracker reduces anxiety · Proactive AI messaging · 24/7 conversational AI · Mobile-first

# How AI Transforms Decision-Making, Workflows & Problem-Solving

From LWCC to industry-wide implications



## AI-POWERED TOOLS

Unified workspaces with intelligent queues and contextual recommendations. At LWCC: replaced 6 screens with one AI surface.



## AUTOMATED WORKFLOWS

Autonomous agents handle extraction, routing, notifications. At LWCC: 24% efficiency gain in Q1.



## AI-DRIVEN INSIGHTS

Predictive analytics and fraud scoring that surface risk before humans see it. At LWCC: 0.12 threshold for proactive flagging.



## DECISION SUPPORT

Explainability panels with confidence scores and structured override loops. At LWCC: CSAT 3.8 → 4.2.



## INDUSTRY IMPACT

AI transforms claims from reactive to predictive, trust-first service design. The design leader's role: ensure AI serves humans.

# Business Outcomes

24%

**Efficiency  
Improvement**

First quarter post-launch

3.8 → 4.2

**Customer  
Satisfaction**

CSAT score increase

30%

**Cycle Time  
Reduction**

Discovery to design

\$4M+

**Revenue  
Expansion**

Upsells from expanded scope

# Beyond the Metrics

Organizational, strategic, and AI-transformation outcomes



## UX → End-to-End AI Service Design

Expanded from UX-only to full-service design with AI — backend processes, agent design, organizational change.



## Repeatable AI Enablement Playbook

Packaged discovery, AI readiness, trust framework, and training into a scalable playbook for future implementations.



## Team Growth & AI Mentorship

Structured mentoring around AI design. 4 of 6 mentees promoted. Leadership requested continued participation.



## Forward Deployment Validated

Embedded design leadership produces superior outcomes vs. remote — directly applicable to forward-deployed consulting.

# What I Learned

## AI trust is designed, not assumed

Users won't adopt AI unless they see its reasoning and can override. Explainability is the foundation.

## Legacy transformation is service design

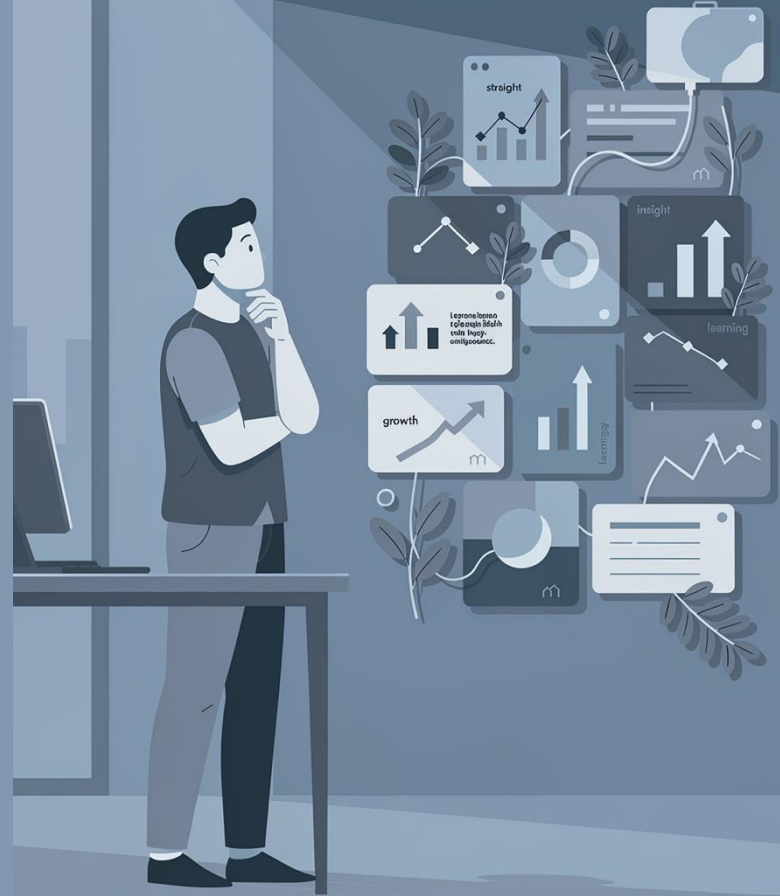
The screens were the output. The real work was redesigning roles, handoffs, and human-AI collaboration.

## Forward deployment changes everything

Embedding with the client gave access to real workflows, politics, and emotional context remote can't capture.

## What I'd do differently

Invest earlier in AI literacy training. The tech was ready before the org was — that gap created adoption friction.







# Thank You

*Let's talk about how AI-centered design leadership  
drives enterprise transformation.*

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