Project Title: "Insurance CRM – Policy & Claim Management System"

- **Industry:** Insurance

- **Project Type:** B2C Salesforce CRM Implementation

- **Target Users:** Insurance Agents, Claims Officers, Policyholders, and Managers

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Problem Statement :-

An insurance company manages thousands of policies and claims across health, life, and vehicle segments. However, policy renewals are often missed due to manual tracking, leading to revenue loss and poor customer retention. In addition, claim processing is slow and lacks transparency, which frustrates customers and delays settlements. Agents also face challenges in tracking and following up with policyholders because of scattered data and the absence of automation.

To address this, the company wants to implement a Salesforce CRM to:

- Automate policy renewal reminders and customer notifications

- Manage claims with clear status tracking and approval workflows

- Assign and escalate cases to agents based on workload and priority

- Provide managers with real-time dashboards and reports for better decision-making

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Use Cases :-

- **Policy Management**

➢ Maintain records of policies (health, life, vehicle) with coverage, premium, and expiry date

➢ Link policies to customers and track status (active, expired, renewed)

- **Renewal Reminders**

➢ Auto-generate SMS/Email reminders for upcoming renewals

➢ Notify agents for timely follow-up with policyholders

- **Claim Management**

➢ Allow customers to submit claims via portal or agents

➢ Track claim status (submitted → verified → approved/rejected)

➢ Auto-escalate claims breaching SLA timelines

- **Agent Assignment**

➢ Automatically assign claims or renewals to available agents

- ➤ Escalate unresolved cases to senior officers or managers
- **Reporting & Dashboards**
- ➤ Renewal rates by policy type and region
- ➤ Average claim resolution times
- ➤ Agent productivity metrics (claims processed, renewals closed)