Salesforce Customer 360 for Insurance Agencies and Brokerages

Drive efficient growth for your insurance agency or brokerage with AI-powered, custom-built solutions.

Salesforce's Customer 360 for Insurance enables agencies and brokerages to connect and empower their entire organization spanning Marketing, Sales, Service, Data, IT and Analytics. Our AI-driven, connected platform can help your businesses optimize costs, reduce complexities via system consolidation, and maximize your ROI. Customers achieve these goals with a portfolio of technology and services designed to enable all of your teams – spanning front, middle and back office operations.

1

Lower Costs
Enable 360-degree views and gain understanding of clients and referrals with actionable insights and predictions – all from one trusted platform.

2

Increase Productivity
Boost efficiency and improve margins by automating routine processes while scaling client engagements.

3

Drive Efficient Growth
Increase client satisfaction through omnichannel access with portals, apps, chat, and other technologies that support efficient growth.

4

Innovate Rapidly
Benefit from an agile, low-code, cloud-first approach that lowers maintenance costs and enables efficient remote or hybrid work – allowing you to attract and retain top talent.

WHY SALESFORCE INSURANCE CUSTOMER 360?

31% Higher win rate*

27% Reduction in IT costs*

29% Increase in collaboration*

*2019 through 2023 Salesforce C360 and Insurance Customer Success Metrics.

Insurance Brokerage Cross-Cloud Solution

Digital Marketing

21% — **Increase in cross-sold business lines***

Out-of-the-box producer marketing
Easily deliver on-brand content, resources, and tools to your Sales and Marketing teams – powered by generative and predictive AI. Drive impactful client engagement with actionable insights surfaced from pre-built dashboards.

Digital demand generation
Design, execute, and measure campaigns that drive ROI on a connected marketing and sales platform. Leverage AI insights, automation, and segmentation to qualify, score, and deliver high quality leads. Return high potential but immature leads for nurturing.

Sales Optimization

3.7x — **Industry average sales productivity***

Producer desktop
Unify lines of business around a 360-degree view of each client, carrier, and partner to efficiently deliver personalized engagements. Leverage the Dynamic Producer Dashboard and real-time insights to develop next best actions and informed client strategies – all directly from your Salesforce desktop.

Opportunity management
Streamline sales processes from lead tracking through proposal management. Implement pre-built sales stages that organize and automate client engagements to increase productivity and drive cross-sell and upsell opportunities.   Simplify client management, including insight-driven meeting prep and follow ups, with generative and predictive AI.

Digital workstation
Conduct critical business operations virtually and provide employees, partners, and clients with the essential tools and information they need to collaborate in real-time. Empower your business network to engage on one fully connected platform.

Onboarding

75% — **Reduction in onboarding time***

Client onboarding
Transform the broker of record (BOR) onboarding process into a connected, client-centric experience that spans documentation gathering, progress reporting, client communication, and self-service engagements. Seamlessly transition new business to account management/service teams to begin coverage planning, consultation, and more.

Employee onboarding
Recruit, appoint, and retain top agents and brokers with modern, innovative technology. Orchestrate end-to-end talent management spanning training, licensing, career development, and more. Support your sales team with a fully automated process that empowers them to maximize their potential and engage with clients in an integrated way at every level.

Mergers and Acquisitions

Business integration
Use the Salesforce Customer 360 tech stack to facilitate data sharing, task management, and collaboration with your new partner agency. Protect, monitor, and retain critical Salesforce and third-party data via platform encryption, event monitoring, and field audit trail management.

Insurance Brokerage Cross-Cloud Solution

Connected Service

2x Industry average Net Promoter Score (NPS)*

Client-centric service
Keep relationship data and analytics in one place to better serve clients. Reduce handle times and make new representatives more efficient with generative AI to create insight driven responses, summaries and knowledge articles.

Claims tracking
Act on behalf of your customers by filing claims, advocating for their swift payment, and more. Track and report on carrier claims SLAs with easily configured dashboards and communicate real-time updates via digital collaboration tools. Empower third-party administrators and clients with a full end-to-end claims system of record.

Drive team productivity
Automate closed-lost processes to enable bulk cancellations of all selected plans/policies across clients and lines of business – enabling your team to remove manual tasks and refocus efforts on driving client success.

Renewal and RFP Management

20x Faster renewals*

Renewal and RFP automation
Orchestrate the end-to-end renewal and RFP process from one central place. Use automation to remove unnecessary steps and redundant data entry. Eliminate spreadsheet and email confusion with reusable question banks that are flexible, transparent, and trackable. Create complex forms from a single source of truth while maintaining the traceability of questions.

Revenue optimization
Leverage predictive AI to forecast potential lost broker of record and notify account teams with client details. Empower staff with next best actions, generative AI, and automated outreach to save business at scale.

Comparative Rater Integration

Digitize quoting processes
Comparative raters enable independent insurance brokerages and agencies to quote coverage with all of the carriers they represent at one time. Salesforce enables digital quote submission and then seamlessly connects to market-leading comparative rating solutions with open APIs.

Drive team efficiency
Service and Sales teams can research, compare competitive quotes, and bind policies for both personal and commercial lines of insurance coverage without ever leaving the cloud – and without having to re-enter customer information in another system.

Data driven marketing
Our Customer Data Platform (CDP) can process deep intelligence on your clients during quoting and use that data to power highly personalized campaigns. Seamlessly connect data intake and digital marketing to expand client data profiles, save time, and improve service to grow your business.

Insight Driven Analytics

Complete AI-driven analytics solution
Build and easily share reports for all aspects of your business from one platform. Harness the power of predictive AI by analyzing in-force policies and building and delivering personalized coverage recommendations at scale.

Develop accurate forecasts by analyzing existing book of business, premiums, and commissions with AI.

Salesforce Clouds to Drive your Business Forward

Financial Services Cloud

Purpose-built industry functionality that includes the capabilities of Sales and Service Cloud to drive efficiency, sales growth, and connected customer engagements, fueled by AI and the Einstein Trust Layer.

Sales

Simplify and manage the entire sales cycle – from prospecting to up-selling and cross-selling. Automate and scale your manual sales processes, inspect your pipelines and forecasts, connect customer touchpoints, and more.

Service

Scale service while maximizing efficiencies from the contact center to the field. Manage critical touchpoints to provide seamless customer experiences including self-service, field service, and omni-channel communications.

Marketing Cloud

Save time, increase efficiency, and meet customers on email, web, social, and mobile. Unified analytics and AI help you get the most out of every dollar of campaign spend. When combined with Sales Cloud and Service Cloud, runs fully integrated lead management campaigns.

Data Cloud

Connect your web, mobile, API, CRM, and real-time data to give your teams a complete picture of your customers. Help teams make every customer touchpoint hyper-personalized and build stronger customer relationships at scale.

Slack

Simplify communication and information sharing across your ecosystem. Increase productivity by connecting your teams, customers, and partners in a digital place that's fast, flexible, and inclusive for a work-from-anywhere world.

Digital Insurance Platform

Enable end-to-end management of core insurance operations spanning product development, quoting, policy administration, and claims.

Analytics

Real-time analytics and insights into next best actions across full 360 degree views of accounts. Predict prospect likelihood, track operations, monitor business performance to identify at-risk agents, and more.

Mulesoft

Accelerate innovation at scale for your organization by empowering IT and business teams to innovate faster. All with a unified platform for integration, universal API management, automation, and API ecosystems.

Commerce Cloud

Build simple, seamless business-to-consumer (B2C) and business-to-business (B2B) commerce experiences that help grow revenue, engage customers, and connect commerce to the rest of the business.

Experience Cloud

Quickly create industry-best digital experiences like agency and policyholder portals. Customize every pixel, or use our out-of-the-box templates to create websites with faster time to value.

Platform, Partners & AppExchange

AppExchange is the most trusted enterprise cloud marketplace with more than 7,000 apps and certified consulting organizations. Includes custom apps, change and release management tools, and more. Secure your enterprise with Shield and serve customers locally with Hyperforce.

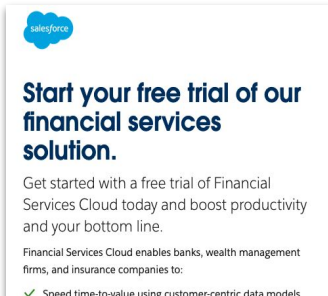Salesforce Customer 360 for Insurance Agencies and Brokerages

Innovate with Salesforce's Insurance Customer 360

Salesforce is the world's #1 AI CRM that empowers insurance businesses with unmatched integration, intelligence, automation capabilities, and open, low-code / no-code applications to help them exceed business goals. Here are some resources to help you understand our Customer 360 or add new technology and service solutions to your organization.

Contact us.

Building trust with your customers takes time and a consistent track record. Salesforce has taken the world's #1 CRM and reinvented it for financial services. So you can continually build trust by putting your customers at the center of every interaction.

To learn more about Financial Services Cloud for wealth management, banking, lending, and insurance, simply fill out this short form and we will contact you.

Questions? Call us at 1-800-667-6389.

Start your free trial of our financial services solution.

Get started with a free trial of Financial Services Cloud today and boost productivity and your bottom line.

Financial Services Cloud enables banks, wealth management firms, and insurance companies to:

✓ Speed time-to-value using customer-centric data models

- Add more licenses
- Upgrade to Financial Services Cloud
- Add Salesforce Clouds

- Sign up for a **Free 30 Day Trial** of Financial Services Cloud

- Watch our **Financial Services Cloud for Insurance Demo** to see how it can help your organization

CONTACT US HERE

SIGN UP HERE

WATCH THE DEMO

Visit **bit.ly/SFAgentBroker** to learn more about Salesforce products for insurance organizations.

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Build cross-cloud insurance solutions with streamlined pricing and packaging. Learn more:

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