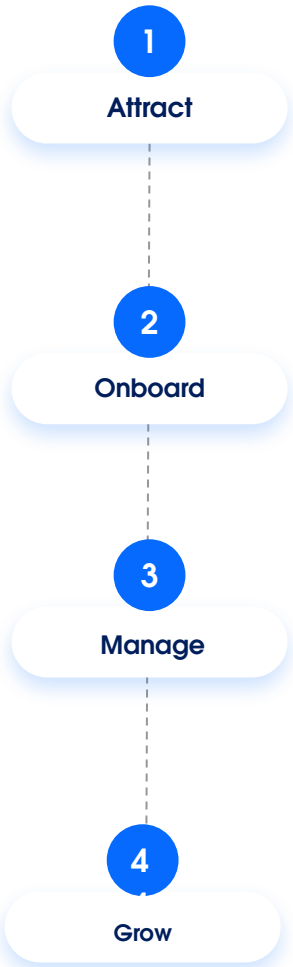




Modernize Distribution Management

Transform into an Agentic Enterprise. Enhance the management, growth, and retention of your distribution network.

Agentforce 360, powered by Agentforce Financial Services, enables insurance carriers and distributors to efficiently manage and grow their producer networks with an improved, purpose-built solution. By replacing spreadsheets and fragmented systems, Agentforce 360 delivers data-driven action, AI automation, and trusted advisor relationships. Equip your teams with pre-built templates, subagents, and workflows tailored to insurance distribution—so you can attract, onboard, manage, and expand your producer network at scale.



Attract: Build a High-Performance Producer Network

Agentforce, powered by the Agentforce Financial Services Insurance Data Model, serves as a virtual headhunter. It identifies qualified producers from the National Insurance Producer Registry (NIPR) and LinkedIn and starts automated outreach. The Insurance Data Model gives a comprehensive profile from day one, showing credentials, licensing, appointment history, and performance. Agentforce qualifies high-intent candidates at all hours via chat or SMS and books appointments. This lets your team focus on building relationships rather than on administration.

Onboard: Eliminate Back-and-Forth, Expedite Time to Production

Agentforce improves onboarding by guiding new producers through data collection and automatically following up on missing documents, such as errors and omissions (E&O) insurance certificates. The Agent & Broker Appointments feature speeds recruitment and licensing with automation and up-to-the-minute tracking. Compliance tools ensure all regulatory requirements are met before a producer issues their first policy. Portal and quoting tools are available immediately upon contract signing, enabling producers to sell on day one.

Manage: Make Smarter Decisions Across Your Agent Portfolio

Gain a comprehensive 360° view of each producer through the Actionable Relationship Center. Access performance metrics, compliance status, credentials, and engagement history at a glance. Flexible Hierarchies empower territory managers to visualize agency, Office of Supervisor Jurisdiction (OSJ), and broker-dealer structures, set strategic plans at each level, and identify advisers within the same OSJ for coordinated engagement. Salesforce Maps prioritizes field visits by score, proximity, and priority. Tableau Next delivers timely dashboards for territory analysis, whitespace identification, and pipeline forecasting.

Grow: Deepen Relationships That Increase Retention and Revenue

Agentforce automates routine tasks, including meeting agendas, interaction notes, and follow-up summaries, enabling relationship managers to focus on building trust. Business Milestones tracks producer events in a visual timeline, linking interactions to accounts and opportunities to avoid oversight. The wholesaler experience displays daily priorities in a unified “My Day” interface, offering pre-meeting briefs, in-meeting Zoom integration with actionable guidance, and post-meeting automation that records interactions and captures product preferences. Win rates improve with next-best-action guidance and predictive recommendations from agency and producer data in Data 360.

How can this solution help your business?



increase in sales revenue*



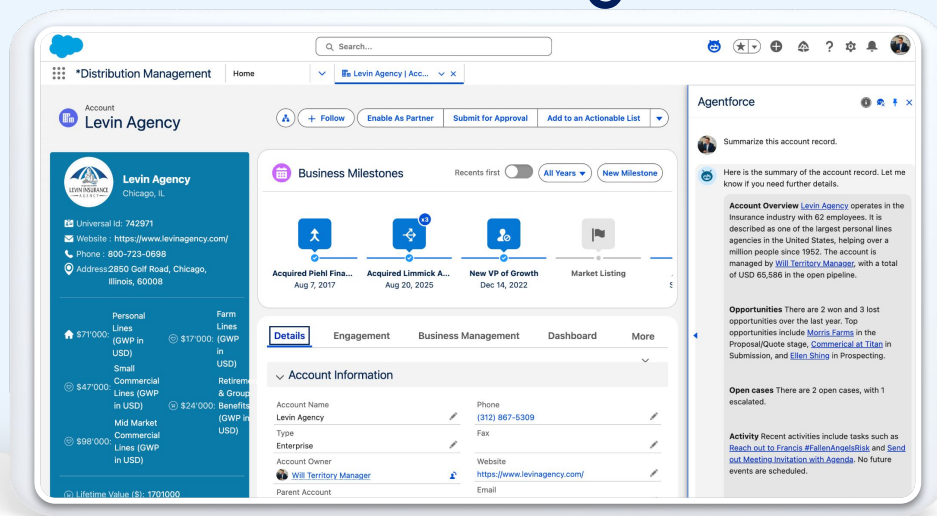
decrease in agency visit report prep time*



faster quoting process*

* FY26 Customer Success Metrics

Modernize Distribution Management



Profitable growth via segmentation

Achieve profitable growth through actionable segmentation, producer lead scoring, agency profiles, and territory mapping. Simplify your strategy and identify cross-sell opportunities to boost existing resources.

AI-Automated meeting management

Agentforce automates meeting preparation, logistics, follow-ups, and summaries, enabling territory managers to concentrate on high-value meetings rather than administrative tasks.

Actionable agency insights

Foster lasting agency relationships with timely data from Data 360. Monitor engagement to enhance retention and deliver improved forecasting and recommendations at scale.

AI-Centered sales platform

Provide sales management and leadership with an AI-powered, centralized platform that places agencies and producers at the center of engagements and decision-making.

What's included in this solution?



Improve efficiency, increase growth, and strengthen engagement across your distribution network with insurance-specific data models and workflows. Visualize and understand complex relationship hierarchies to uncover hidden opportunities to proactively deepen territory relationships.



Use pre-built templates, subagents, and actions to improve producer scouting, onboarding, compliance, provisioning, and relationship management in a coordinated solution.



Facilitate data-driven decisions with visual insights, AI-powered predictions, and ready-to-use dashboards for distribution management.



Equip independent brokers and referral partners with outcomes-based enablement, Agentforce guidance, co-sell visibility, and unified incentive management.



Integrate structured and unstructured CRM and external data to give Agentforce and employees a unified, reliable view of all partners and producers.



Act as the engagement platform where teams and Agentforce coordinate in real time, surface CRM alerts, speed up approvals, and help producers and field teams respond quickly.



MuleSoft provides immediate value with a unified solution for multi-agent orchestration, integration, and APIs, connecting your distribution ecosystem from end to end.

See the Distribution Management Solution in action.
Watch the Modernize Insurance Sales demo.
sfdc.co/insurance-sales

Contact us to learn more
1-800-667-6389