salesforce

Grow revenue, deepen client relationships, and work smarter — on the #1 AI CRM for Insurance.

Insurance agencies and brokerages face mounting pressure: rising client expectations, fragmented systems, and the constant demand to do more with less. Salesforce brings together Agentforce 36O Financial Services and Data Cloud on a single, trusted platform – connecting your entire organization across sales, service, marketing, and operations. Deploy autonomous AI agents that handle the routine so your producers and account managers can focus on what matters most: building trusted client relationships and growing revenue.

1 Empower Teams

2 Reduce Costs

3 Increase Productivity

4 Drive Growth

Empower with Agentforce

Deploy autonomous AI agents – powered by your own CRM and client data – that work 24/7 to handle routine tasks like meeting prep, follow-ups, and client outreach. Free your producers and account managers to focus on high-value relationships and revenue growth.

Reduce Costs and Complexity

Consolidate disconnected point solutions onto one unified platform. Eliminate redundant tools, reduce compliance overhead, and lower total cost of ownership – while gaining a single source of truth across your entire brokerage operation.

Increase Productivity

Automate manual workflows end to end, streamline onboarding, and surface AI-driven insights that help every team – from producers to service reps – move faster, close more, and deliver better client experiences.
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Drive Efficient Growth

Expand client relationships with omni-channel engagement across portals, apps, email, and chat. Use Agentforce-powered predictions to identify cross-sell and upsell opportunities and deliver personalized experiences at scale.

See what's included in this solution:

Agenforce Financial Services for Insurance Brokerages allows you to unify producers and account managers while reimagining agency management on a customer-centric platform.

Data 36O unifies and activates all your brokerage data – across policy systems, CRM, carrier feeds, and third-party sources – in real time.

Agentforce Marketing allows you to engage producers, clients, and prospects across every channel with AI-powered personalization.

How can this solution help your business?

30%
increase in sales revenue*

26%
decrease in service/support costs*

34%
increase in employee productivity*

salesforce

Insurance Brokerage
Cross-Cloud Solution

Digital Marketing

32% increase in marketing ROI*

Streamlined martech stack

Consolidate your marketing technology onto one AI-powered platform – covering digital advertising, email activation, social media, and marketing intelligence. Replace fragmented point solutions with a unified engine that scales with your brokerage.

Out-of-the-box producer marketing

Deliver on-brand content, resources, and enablement tools to your sales and marketing teams – powered by Agentforce and Data Cloud. Surface actionable insights from prebuilt dashboards to drive smarter, faster client engagement.

AI-powered demand generation

Design, execute, and measure campaigns with built-in AI segmentation, lead scoring, and automation. Qualify high-intent prospects, nurture immature leads, and deliver a seamless handoff to sales – all on one connected platform.

Sales Optimization

29% increase in sales pipeline*

Agentforce Sales Coach

Give every producer an always-on AI coach – grounded in your CRM and client data – that helps them prepare for client meetings, practice their pitches, and receive deal-specific feedback based on the opportunity stage and context.

Opportunity management

Streamline the full sales cycle from lead to close with prebuilt insurance sales stages, automated workflows, and Agentforce-generated meeting prep, follow-up summaries, and next-best-action recommendations.

Dynamic Producer Desktop

Give producers a unified 360-degree view of every client, carrier, and partner. Surface real-time insights and AI-driven next-best actions directly in the workflow – enabling smarter client strategies and faster decisions.

Onboarding

24% reduction in onboarding time*

Client onboarding

Transform the broker of record (BOR) process with a connected, client-centric experience – powered by the Broker of Record Tracker. Automate documentation gathering, progress reporting, and client communications, then seamlessly transition accounts to service teams for coverage planning and consultation.

Employee onboarding

Recruit, appoint, and retain top producers with modern talent management workflows – spanning licensing, training, career development, and automated credentialing – so your sales team is productive from Day 1.

Mergers and acquisitions

Accelerate M&A integration with built-in tools for data sharing, task management, and cross-agency collaboration. Protect critical data assets with platform encryption, event monitoring, and field audit trail management.

> "Our teams use automation to simplify how we handle new business, renewals, and so much more. With Salesforce, we've achieved millions in cost savings and saved thousands of employee hours while delivering better client experiences."

HOLMES MURPHY.

Andy Smith-Jones, Salesforce Solutions Architect, Holmes Murphy

* FY26 Customer Success Metrics

Insurance Brokerage
Cross-Cloud Solution

Connected Service

33% improvement in customer satisfaction (CSAT)*

Automate retention with Agentforce

Use Agentforce to proactively identify at-risk broker of record relationships and automatically alert account teams with full client context. Empower staff with next-best actions, AI-generated outreach, and automated workflows to protect and grow your book of business at scale.

Empower account teams

Keep all relationship data, policy history, and analytics unified in the Insurance Service Console. Accelerate handle times and ramp new reps faster with Agentforce-generated response drafts, conversation summaries, and auto-populated knowledge articles.

Policy lifecycle management

Manage the full policy lifecycle with Policy Lifecycle Manager. Capture policy-header data and underlying line-of-business details – including limits, coverages, deductibles, and benefits – in a purpose-built data model with automated processes for renewals and cancellations.

Claims tracking

Automatically convert inbound email claim notifications into cases and claims records – reducing manual entry, accelerating response times, and improving operational efficiency.

Renewal and RFP management

Orchestrate the end-to-end renewal and RFP process from a single workspace. Automate repetitive steps, eliminate spreadsheet sprawl, and leverage reusable question banks for transparent, trackable RFP responses built from a single source of truth.

Splits and Revenue Management

24% reduction in time spent on manual tasks*

Producer split arrangements

Simplify split management with a reusable library of producer split definitions – assigned by named producer or role. Apply definitions at the account level with effective dates, auto-inherit at the policy level, and update assignments in bulk as your team evolves.

Commission processing and reconciliation

Reconcile direct-bill commission statements with an automated system that ingests carrier statements, matches them to brokerage policy records, determines producer splits, and calculates commission amounts and production credits.

Agency billing

Take control of your cash flow by turning manual tasks into fast, automated processes. Create branded bills automatically with smart workflows and collect payments easily from customers around the world. Keep your records accurate with automated journal entries and secure period-close features. Reduce risk by tracking payment promises and sending automatic reminders for overdue accounts.

Insight-Driven Analytics with Tableau

84% improvement in the speed of decision-making*

AI-powered analytics with Tableau

Build, explore, and share reports across every dimension of your brokerage with Tableau – the world's leading AI-powered analytics platform. Harness predictive AI to analyze in-force policies, generate personalized coverage recommendations at scale, and develop accurate forecasts for premiums, commissions, and book-of-business performance – all from a single, connected source of truth.

The Salesforce Platform for
Insurance Brokerages

Agentforce

Deploy autonomous AI agents with deep insurance expertise that work 24/7 – handling routine tasks, surfacing actionable insights, and scaling personalized engagement across your entire producer and client network.

Agentforce Financial Services

The #1 CRM purpose-built for insurance agencies and brokerages. Unify client and policy data, automate brokerage workflows, manage producer relationships, and drive growth on one trusted platform.

Agentforce Marketing

Engage producers, clients, and prospects across every channel with AI-powered personalization. Design and automate campaigns that drive acquisition, deepen relationships, and maximize marketing ROI.

Slack

Connect producers, account managers, underwriters, and leadership in one intelligent workspace – with AI-powered search, automated workflows, and real-time collaboration built in.

Salesforce Platform

Build and extend your brokerage solutions on a trusted, scalable foundation – with low-code tools, robust APIs, and event-driven integrations that connect your entire technology ecosystem.

Data 360

Unify and activate all your brokerage data – across policy systems, CRM, carrier feeds, and third-party sources – in real time. This trusted data foundation powers Agentforce AI agents, personalized engagement, and predictive analytics at scale. And now with Informatica, every Agentforce interaction and producer touchpoint is grounded in a single, trustworthy version of the truth.

MuleSoft

Connect legacy policy systems, carrier data, and third-party platforms with enterprise-grade APIs and integrations – delivering the right data, to the right teams, in real time.

Tableau

Turn brokerage data into strategic decisions. Tableau's AI-powered analytics platform delivers visual insights, predictive forecasting, and prebuilt insurance dashboards that empower everyone from producers to the C-suite.

Experience Cloud

Launch branded, data-powered portals and self-service apps for clients, producers, and carrier partners – connected seamlessly across the full customer journey.

AppExchange

Access the world's leading enterprise cloud marketplace with hundreds of prebuilt insurance apps and vetted expert partners, so you can extend your Salesforce investment and deploy faster.
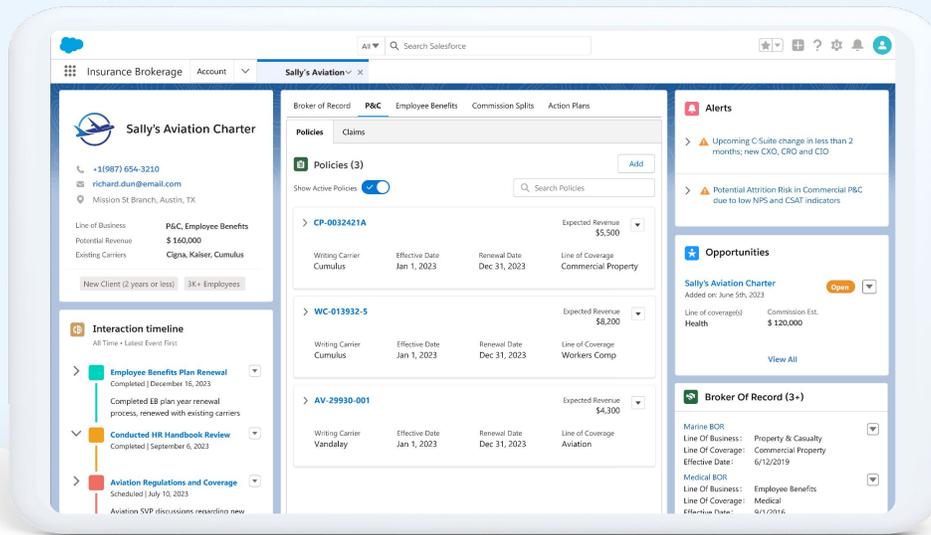

HOSKET ULEN INSURANCE SOLUTIONS

"The platform with Salesforce is so important for agents and carriers because it's moving away from that policy-centric mentality and helping us focus on knowing our customers."

Brad Hosket, Principal, Hosket Ulen

Fuel growth and deepen relationships with Salesforce for Insurance Agencies and Brokerages.

Salesforce is the world's #1 AI CRM – built to help insurance agencies and brokerages grow revenue, retain top producers, and deliver exceptional client experiences. With Agentforce, Agentforce Financial Services, and Data 36O working together on one platform, your teams get the AI, automation, and real-time insights they need to outpace the competition and exceed client expectations every time.

Contact us here

Inquire about upgrading to Agentforce Financial Services.

Access a free trial

Sign up here for a free 30-day trial of Agentforce Financial Services.

Watch demo

Watch our Agentforce Financial Services for Insurance Brokerages Demo to see how it can help your organization.

Visit our agent/broker web page to learn more about Salesforce products for insurance organizations.