Unify producers and account managers on a customer-centric platform.

Here's how it works.

Deliver modern experiences for producers and account managers on a flexible, client-centric AI platform to improve client retention, automate routine processes, and streamline operations.

1 Connect

Unify the front office

Bring producers and account managers together on a single, customer-centric platform to gain visibility across lines of business and increase productivity by eliminating manual handoffs and empowering teams to personalize client interactions.

2 Streamline

Automate the client journey

Simplify policy servicing from placement to renewal. Insurance-specific data models and pre-built processes designed for brokerages help you easily calculate rates, track employee benefit contributions, and manage property and casualty data.

3 Extend

Tailor brokerage workflows

Manage complex financial operations for the unique needs of your business. Help finance teams handle commission splits and simplify billing with automated invoicing to ensure every dollar is accounted for.

See what's included in this solution:

Client Account Management
Centralize operations and deliver personalized service.

Employee Benefits Management
Manage group benefits, rate calculations, and contributions.

Property & Casualty Policy Management
Maintain coverages, assets, and limits.

Commissions & Revenue
Manage complex split agreements and reconcile carrier statements.

Agency Billing
Simplify invoicing, payment collection, and general ledger tracking.

30% productivity gap for agencies without AI-driven workflows[1]

Learn more about Agentforce Financial Services for Insurance Brokerages.
sfdc.co/brokerage

[1] Gartner, August 2025

Streamline operations and boost productivity to grow your bottom line.

Operational Efficiency

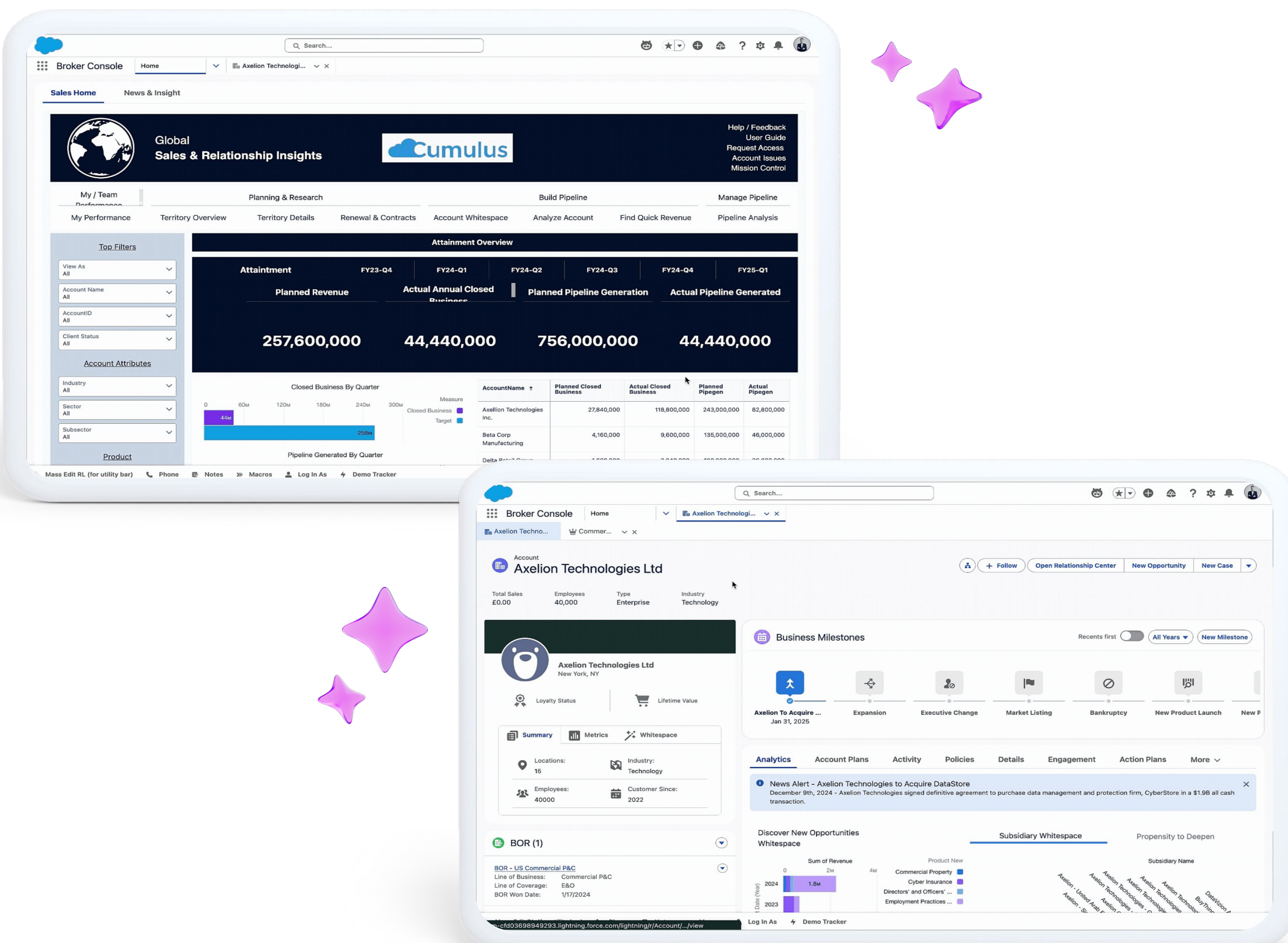
Guide onboarding and capture Broker of Record details with Agentforce. Orchestrate workflows using templates to track required tasks, automate invoice and processing of direct bill commission statements, and ensure financial integrity with automated journal entries and secure period controls.

Account Manager Experience & Productivity

Capture policy and plan data in a purpose-built data model. View a comprehensive client profile in a single console and prioritize and automate repeatable tasks.

Revenue Growth

Track expected revenue compared with actual commission statements and quickly identify discrepancies. Minimize revenue leakage by transforming collections into a streamlined background process that proactively tracks delinquencies, manages promises to pay, and sends automated late payment emails. Retain clients with alerting and automation for renewals, and gain visibility across business lines to grow your business.



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Drive efficiency and improve margins on a C360 platform.

Core Solution Features

Capability	Feature	Included	Uses Credits
Client Account Management	**Broker of Record Tracker** Centralize BOR agreements in the client record, enabling producers and account managers to instantly access and update statuses.	✓	
	Insurance Service Console View comprehensive client profiles across lines of business in a single console to personalize conversations.	✓	
	Action Plans Eliminate manual handoffs by transforming fragmented tasks into seamless, automated journeys.	✓	
	Discovery Framework Deploy intelligent discovery processes for plan year placement and carrier request for proposal (RFP) procedures.	✓	
Employee Benefits Management	**Policy Lifecycle Manager** Capture plan data to renew policies with the same or different carriers and cancel policies–individually or in bulk.	✓	
	Plan Rate Calculator Record plan rates, premiums, and fees. Calculate expected revenue for fully-insured and self-insured plans.	✓	
	Plan Contribution Tracker Easily support and manage multiple employer or employee contribution schedules on a single plan.	✓	
	Plan Benefit Tracker Simplify benefit tracking with intuitive user experiences for plan summaries. Standardize definitions across carriers.	✓	
Property and Casualty Policy Management	**Policy Lifecycle Manage** Maintain policy headers, participants, assets, coverages, limits, deductibles, and retention with a purpose-built data model	✓	
	Claim Tracker Improve claim response times by automatically converting email claims notifications to cases and creating tracking claims	✓	

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Core Solution Features

Capabilities	Feature	Included	Uses Credits
Commissions and Revenue	**Producer Split Manager** Utilize a library of reusable producer split definitions (explicit or role-based) and automatically inherit them at the policy level	✓	
	Direct Bill Commission Processor Ingest carrier commission statements, match them to policy records, determine splits, and calculate commission amounts	✓	Brokerage Credits
	Expected Revenue Tracker Track expected revenue to compare with actual commission statements and quickly identify discrepancies	✓	Business Rules Engine Credits
Agency Billing	**Policy Lifecycle Services** Manage complex policy events, like issuance, renewals, endorsements, and cancellations using tailored services and configurable fields and definitions	✓	Brokerage Credits
	Billing Configuration Define flexible customer payment terms and billing methods to ensure downstream billing data is accurate from the start	✓	
	Transaction Breakdown Instantly capture granular premium, tax, fee, and commission details to create an auditable record	✓	
	Invoicing Generate accurate invoices automatically using customizable templates, adjust with memos, and email via automated workflows	✓	Brokerage Credits
	Payment Runs Automate payment runs to collect funds and settle open invoices using native and third-party payment gateways	✓	
	General Ledger Tracking Automatically generate and post journal entries to the general ledger, support period close, and prevent post-close postings	✓	
	Collections Proactively manage overdue invoices, capture payment promises, and sendutomated late emails to minimize overdue risk	✓	

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