



# Next-Gen Service for Insurance

## Balance empathy and efficiency with an unified, agentic AI platform

Transform into an Agentic Enterprise. Policyholders expect fast, empathetic, and always-on service, especially during stressful moments. Agentforce 360, powered by Agentforce Financial Services, enables insurance carriers and brokerages to transcend fragmented legacy systems and manual processes with data-driven automation, trusted AI, and integrated service experiences. Equip your contact center and operations teams with purpose-built agents, workflows, and process templates designed for insurance, allowing you to deflect routine inquiries, accelerate claims intake, and strengthen policyholder loyalty at scale.



### 1 Deflect: Reduce costs with intelligent self-service

Enable policyholders to resolve common service issues and find answers easily through digital self-service. Lower your service costs and allow CSRs and claim reps to focus on complex, high-empathy interactions.

### 2 Intake: Resolve issues quickly in the contact center

Use AI to scale the best practices of your top-performing CSRs. Resolve policyholder issues faster with pre-built workflows based on a unified view of each policyholder's coverage, claims, and interaction history. Deliver personalized, consistent service across all channels while maintaining compliance.

### 3 Process and Resolve: Automate service operations

Streamline complex back-office requests such as FNOL, claims triage, policy changes, and complaints. Leverage automation and AI to simplify information gathering, remove manual handoffs, and ensure transparency so that no critical regulatory or service step is missed.

### 4 Refer and Improve: Drive performance, growth, and proactive loyalty

Transform your service operations from a cost center to a profit center. Identify service bottlenecks early, support effective agent coaching, and streamline cross-line-of-business referrals so that routine service interactions lead to additional coverage or product opportunities.

## How can this solution help your business?



faster resolution time\*

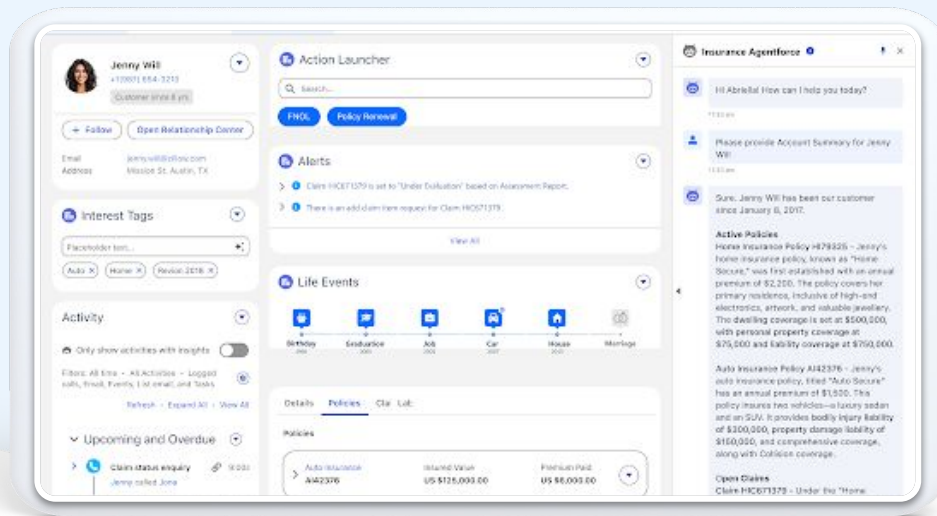


see an improvement in teamwork or team collaboration\*



faster response to customers/prospects/employees/partners\*

\* FY26 Customer Success Metrics



## Personalized service at scale

Deliver highly personalized policyholder experiences across all channels by basing each engagement on a unified, real-time view of every policyholder's complete coverage, claims, and household history.

## AI-automated case resolution

Agentforce autonomously and compliantly manages routine inquiries, FNOL intake, and policy servicing requests around the clock, allowing your CSRs and adjusters to focus on complex, high-empathy situations that matter most to policyholders.

## Operational efficiency and compliance

Streamline back-office workflows with prebuilt automation for claims processing, policy changes, complaints, and FNOL. Ensure consistent compliance at every step so that no critical regulatory requirement is missed by human or AI teams.

## Service as a growth engine

Turn every service interaction into an opportunity for retention and revenue. Identify proactive signals, guide next-best-action recommendations, and route cross-line referrals to the appropriate specialist, increasing share of wallet and policyholder lifetime value.

# What's included in this solution?



## Agentforce Financial Services

An industry-specific CRM foundation designed for insurance carriers and brokerages. Provides insurance-specific data models, a unified policyholder and household view, prebuilt service workflows for claims, FNOL, policy servicing, and complaints, and a Unified Service Catalog. This enables both human teams and AI agents to execute the same automated processes, eliminating duplicate development and accelerating time-to-value.



## Agentforce

Deploy prebuilt, insurance-trained AI agents, subagents, and actions to deflect routine policyholder inquiries, automate FNOL and claims intake, guide CSRs with real-time support, and proactively identify at-risk policyholders. All functions operate within your regulatory requirements, 24/7, without increasing headcount.



## Data 360

Deploy prebuilt, insurance-trained AI agents, subagents, and actions to deflect routine policyholder inquiries, automate FNOL and claims intake, guide CSRs with real-time support, and proactively identify at-risk policyholders. All functions operate within your regulatory requirements, 24/7, without increasing headcount.



## Agentforce Service

Provides every CSR and claims representative with a trusted AI copilot designed for the insurance contact center. Agentforce Service presents complete policyholder context, recommends next-best actions, drafts responses to common inquiries, and guides agents step-by-step through complex policy servicing and complaints workflows. This enables your team to resolve more cases per hour with greater consistency and full regulatory compliance.



## Agentforce Field Service

Extends agentic service beyond the contact center to inspectors, appraisers, and field adjusters. It intelligently schedules and dispatches the appropriate field resource to each loss location at the optimal time, optimizing for proximity, licensing, and severity. Field teams arrive with complete claim and policy context, complete guided mobile workflows on-site, and sync outcomes in real time, reducing cycle time and improving loss ratios.

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## Agentforce Contact Center

Unify your omni-channel contact center operations on a single AI-powered platform designed for high-volume insurance environments. Agentforce Contact Center integrates voice, digital, and self-service channels, routing policyholders intelligently, providing real-time agent guidance, automating after-call work, and giving contact center leaders full visibility into SLA performance, handle times, and AI containment rates for every interaction.



## Agentforce Voice

Transform the voice channel, the primary channel for high-stakes insurance moments into an intelligent, always-on experience. Agentforce Voice deploys conversational AI agents that autonomously handle inbound calls, deflect routine inquiries, capture claim details accurately, and escalate to a live specialist with full background when human review is required.



## Slack

Serves as the real-time collaboration layer where service teams, adjusters, and Agentforce coordinate to resolve complex policyholder cases efficiently. Surface case alerts, accelerate expert escalations, and enable cross-departmental collaboration to keep every stakeholder aligned from FNOL through final resolution.



## MuleSoft

Connects your core policy administration systems, claims platforms, and legacy data sources to Agentforce and your service teams through secure, industry-specific APIs and pre-built integration templates. This facilitates real-time data flows across your enterprise, ensuring that no AI agent or CSR operates on outdated or incomplete information.



## Experiences

Empowers policyholders with branded self-service portals where they can manage policies, check claim status, submit FNOL, and resolve common service needs 24/7. When a human touch is needed, the platform provides an uninterrupted, context-preserving handoff to a live agent.



## Tableau

Equips contact center leaders and operations teams with real-time visual intelligence, including SLA adherence, case volumes, agent productivity, and AI performance metrics. Conversation Mining and Customer Signals Intelligence reveal hidden service friction and churn risks at scale, transforming your service data into continuous improvement and proactive retention.