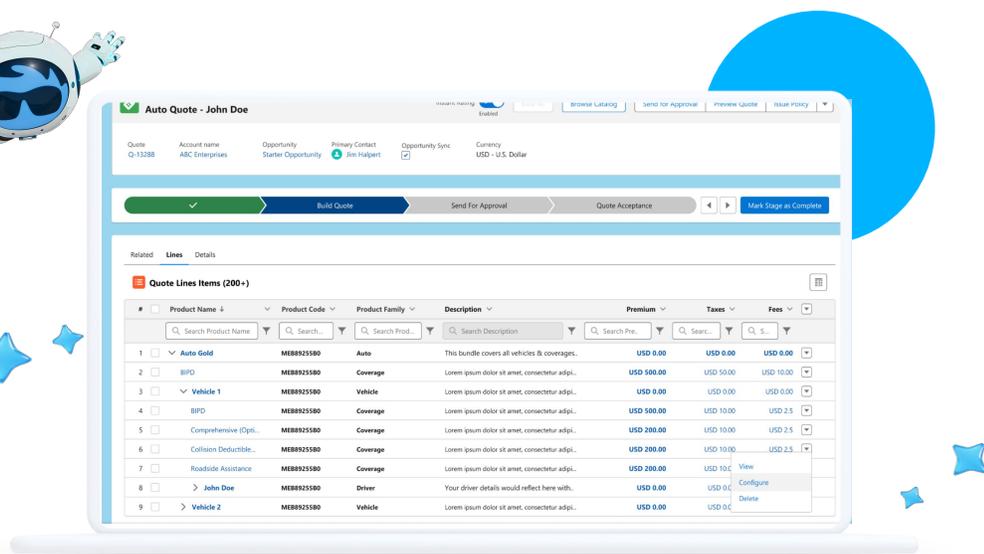


# Streamline Customer-Centric Policy Journeys on a Unified Platform

Salesforce empowers insurers and managing general agents to swiftly modernize operations and become an agentic enterprise. Our Policy Administration module lets you streamline and scale policy lifecycle processes for property and casualty, life, health, specialty, and commercial lines —spanning quoting, underwriting, issuance, endorsements, billing, cancellations, and renewals. Unlike conventional core systems, these processes are part of a deeply unified cloud-native platform that connects integrated customer insights, trusted intelligent automation, and end-to-end digital customer journeys.

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**Personalize & Engage**  
 Use unified real-time customer insights to create tailored quotes. Drive engagement with consumer-grade experiences for quoting, MTAs, and more across preferred digital channels.
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**Drive Automated Operations**  
 Use Agentforce AI for instant policyholder insights. Automate API-driven data enrichment, invoke rating, and use rules to streamline work and drive straight-through processing.
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**Scale Flexible Quoting**  
 Configure and easily change coverages, terms and quotes, dynamically reprice and compare versions, and distribute at scale including through pre-built customer and broker portals.
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**Deliver Seamless Experiences**  
 Manage transactions and experiences across the full policy lifecycle, and seamlessly connect customer experiences across marketing, sales, service and claims for complete engagement.



## Here's how Salesforce Policy Administration works.

### Configure Policy Quotes

Efficiently design and manage accurate insurance quotes to meet diverse customer needs.

- Create, version, and configure coverage terms guided by flows and dynamic rules.
- Rate policies in real-time and easily reprice with changes in terms with AI-assisted matrix lookups and calculation procedures.
- Drive the quote through approvals with status-based rules and intuitive navigation tools.
- Leverage product and class-based rules to automate referrals to underwrite and drive straight-through processing.

### Process Policy Transactions

Efficiently manage the entire policy lifecycle from issuance and modifications to renewals and cancellations with automated precision.

- Create a new policy based on an approved quote, including the creation of insured items.
- Calculate prorated changes in premium, taxes, and commissions.
- Modify coverages and insured items.
- Renew policies with configurable processes based on expiration dates and product and class-specific workflows.
- Cancel policies and instantly calculate prorated premiums and post the correct refund amounts.

### Automate Policy Workflows

Streamline operations by automating critical steps and data enrichment throughout the quote and policy lifecycle.

- Invoke state transition rules to drive quotes and policies through their lifecycle.
- Enrich quote and policy data by calling out to external systems for augmentation.
- Automate underwriting referrals using product- and class-based rules for straight-through processing.

### Deliver Omnichannel Policy Experiences

Provide seamless and consistent customer and partner digital experiences across all touchpoints with intuitive solutions.

- Access preconfigured Lightning Web Components for underwriter and producer desktops in Financial Services Cloud.
- Deliver guided digital experiences for quoting, adjustments, and payments across any channel.
- Process quote, policy data, and transactions in batches.
- Enable brokers and policyholders to access quote and policy data and transactions in Experience Cloud.



*Consolidate and streamline core insurance operations on Salesforce's Digital Insurance Platform. Harmonize core insurance processes with modern digital engagement, unified customer data, and trusted, intelligent automation on a single unified platform.*

**Have questions about Policy Administration?  
Contact us at 1-800-667-6389 to learn more.**