

Power sales, account management, marketing, and data operations on a single, AI-driven platform

Salesforce’s Customer 360 for Insurance allows agencies and brokerages to connect and empower their entire organization spanning Marketing, Sales, Service, Data, IT and Analytics. Agentforce enables producers and account managers to hand off manual work so they can focus on deepening trusted client relationships and growing revenue. Our AI-driven, connected platform helps businesses optimize costs, reduce complexities via system consolidation, and maximize your ROI. Customers achieve these goals with a portfolio of technology and services designed to enable all of your teams – spanning front, middle and back office.

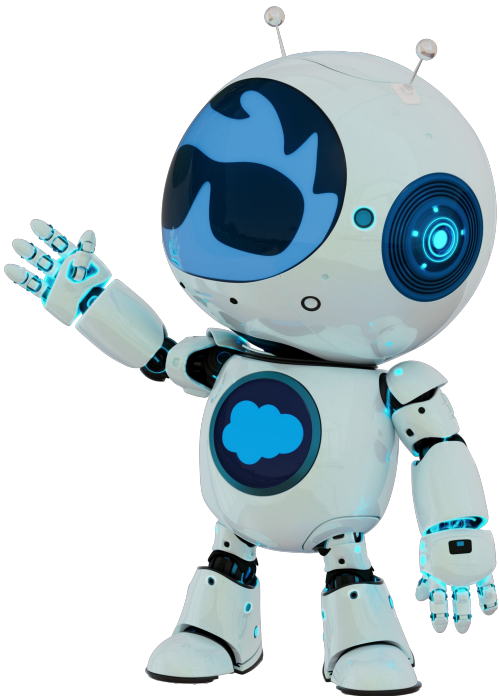
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Empower with Agentforce
 Benefit from a low-code platform that enables teams to build autonomous AI agents that elevate sales and account teams to focus on clients vs redundant tasks – allowing you to attract and retain top talent.
- 2

Lower Cost
 Enable 360-degree views and gain understanding of clients and referrals with actionable insights and predictions – all from one trusted place.
- 3

Increase Productivity
 Boost efficiency and improve margins by automating routine processes while scaling client engagements.
- 4

Drive Efficient Growth
 Increase client satisfaction through omnichannel access with portals, apps, chat, and other technologies that support efficient growth.



WHY SALESFORCE INSURANCE CUSTOMER 360?



*2024 Salesforce Insurance Brokerage Success Metrics.

Insurance Brokerage Cross-Cloud Solution

Digital Marketing

27% Increase in marketing ROI*

Streamlined MarTech stack

Consolidate your marketing tech stack onto one AI-driven platform that can power all your marketing functions including digital advertising, email activation, social media marketing, marketing intelligence, and much more.

Out-of-the box producer marketing

Easily deliver on-brand content, resources, and tools to your Sales and Marketing teams – powered by predictive, generative, and autonomous AI. Drive impactful client engagement with actionable insights surfaced from pre-built dashboards.

Digital demand generation

Design, execute, and measure campaigns that drive ROI on a connected marketing and sales platform. Leverage AI insights, automation, and segmentation to qualify, score, and deliver high quality leads. Return high potential but immature leads for nurturing.

Sales Optimization

33% Faster sales deal closure*

Agentforce sales coaching

Leverage Agentforce Sales Coach (ASC) – powered by your CRM data – to enhance support for sales reps, helping them prepare more effectively for client meetings. Empower producers to practice their pitches and receive tailored feedback based on the specific deal and its current stage.

Producer desktop

Unify lines of business around a 360-degree view of each client, carrier, and partner to efficiently deliver personalized engagements. Leverage the Dynamic Producer Dashboard and real-time insights to develop next best actions and informed client strategies.

Opportunity management

Streamline sales processes from lead tracking through proposal management. Implement pre-built sales stages that organize and automate client engagements to increase productivity and drive cross-sell and upsell opportunities. Simplify client management, including insight-driven meeting prep and follow ups, with generative and predictive AI.

Onboarding

24% Reduction in onboarding time*

Client onboarding

Transform the broker of record (BOR) onboarding process into a connected, client-centric experience that spans documentation gathering, progress reporting, client communication, and self-service engagements – powered by our Broker of Record Tracker feature. Seamlessly transition new business to account management/service teams to begin coverage planning, consultation, and more.

Employee onboarding

Recruit, appoint, and retain top agents and brokers with modern, innovative technology. Orchestrate end-to-end talent management spanning training, licensing, career development, and more. Support your sales team with a fully automated process that empowers them to maximize their potential.

Mergers and acquisitions

Use the Salesforce Customer 360 tech stack to facilitate data sharing, task management, and collaboration with your new partner agency. Protect, monitor, and retain critical Salesforce and third-party data via platform encryption, event monitoring, and field audit trail management.



Insurance Brokerage Cross-Cloud Solution

Connected Service

27% Improvement in customer satisfaction scores*

Automate retention with Agentforce

Leverage Agentforce to forecast potential lost broker of record and proactively notify account teams with client details. Empower staff with next best actions, generative AI, and automated outreach to save business at scale.

Empower account teams

Keep relationship data and analytics in one place to better serve clients on the Insurance Service Console. Reduce handle times and make new representatives more efficient with generative AI to create insight driven responses, summaries and knowledge articles.

Line of business servicing

Manage the full life cycle of policies with our Policy Lifecycle Manager feature. Capture policy-header information and underlying line of business data including limits, coverages, deductibles, and benefits – in a purpose-built data model with lifecycle business processes for renewing policies with the same or a different carrier and canceling policies.

Claims tracking

Improve the efficiency and effectiveness of tracking when you convert email claims notifications to cases automatically and create claims.

Renewal and RFP management

Orchestrate the end-to-end renewal and RFP process from one central place. Use automation to remove unnecessary steps and redundant data entry. Eliminate spreadsheet and email confusion with reusable question banks that are flexible, transparent, and trackable. Create complex forms from a single source of truth while maintaining the traceability of questions.

Splits and Revenue Management

24% Reduction in time spent on manual tasks*

Producer split arrangements and assignments

Simplify and streamline tasks with a library of reusable producer split definitions for initial and renewal terms, based on named producers or roles. Apply these definitions at the account level, with effective dates, and automatically inherit them at the policy level. Easily update and reassign splits in bulk as producers or definitions change.

Direct bill commission processing and reconciliation

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

Expected revenue tracker

Track expected revenue to compare with actual commission statements and identify revenue discrepancies.

Insight Driven Analytics

27% Faster decisions*

Complete AI-driven analytics solution

Build and easily share reports for all aspects of your business from one platform. Harness the power of predictive AI by analyzing in-force policies and building and delivering personalized coverage recommendations at scale.

Develop accurate forecasts by analyzing existing book of business, premiums, and commissions with AI.

Salesforce Clouds to Drive your Business Forward



Agentforce

Fuel efficiency and drive superior service 24/7 with an autonomous AI application that provides specialized, always-on support to employees or clients.



Tableau

Boost productivity and decision-making with the world's leading AI-powered analytics platform.



Financial Services Cloud

Modernize brokerage operations on a unified platform that automates processes, deepens client relationships, and drives growth.



Slack

Modernize brokerage operations on a unified platform that automates processes, deepens client relationships, and drives growth.



Data Cloud

Harmonize and activate all your customer data across Salesforce applications.



Experience Cloud

Quickly launch data-powered sites, portals, and apps, connected across the customer journey.



Marketing Cloud

Personalize customer experiences and optimize each campaign with data-first solutions for any channel and device.



Salesforce Platform

Seamlessly integrate disparate systems and data sources with API-led services and event-based interactions.



Mulesoft Anypoint Platform

Integrate data from any services system to deliver critical, time-sensitive data – all with a single platform for APIs and integrations.



Commerce Cloud

Build simple, seamless business-to-consumer (B2C) and business-to-business (B2B) commerce experiences.



Insurance Product Administration

Enable end-to-end management of core insurance operations spanning product development, quoting, policy administration, and claims.



AppExchange

The world's leading enterprise cloud marketplace of proven apps and experts. Easily find financial services solutions that are right for you.

Innovate with Salesforce's Insurance Customer 360

Salesforce is the world's #1 AI CRM that enables insurance businesses with unmatched integration, intelligence, automation capabilities, and open, low-code / no-code applications to help them exceed business goals. Agentforce empowers businesses with an autonomous AI application that provides specialized, always-on support to employees or clients. Here are some resources to help you understand our Customer 360 or add new technology and service solutions to your organization.



Contact us.

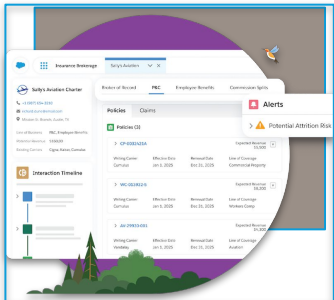
Building trust with your customers takes time and a consistent track record. Salesforce has taken the world's #1 CRM and reinvented it for financial services. So you can continually build trust by putting your customers at the center of every interaction.

To learn more about Financial Services Cloud for wealth management, banking, lending, and insurance, simply fill out this short form and we will contact you.

Questions? Call us at 1-800-667-6389.

- Add more licenses
- Upgrade to Financial Services Cloud
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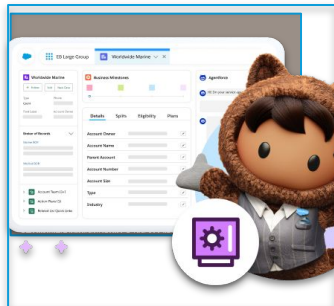
CONTACT US HERE



Insurance Brokerage interface showing various modules like Policy, Claims, Alerts, and Interaction Timeline.

- Sign up for a **Free 30 Day Trial** of Financial Services Cloud for Insurance Brokerages

SIGN UP HERE



Financial Services Cloud for Insurance Brokerage Demo graphic featuring a cartoon character and a gear icon.

- Watch our **Financial Services Cloud for Insurance Brokerage Demo** to see how it can help your organization

WATCH THE DEMO

Visit [Financial Services Cloud for Insurance Brokerages](#) to learn more or visit the [Agent/Broker web page](#) to see our cross-cloud insurance brokerage solutions.

Unlock the power of Salesforce with Agentforce for Financial Services

Deliver AI agents with deep industry expertise to automate tasks, optimize processes, and enhance customer experiences.

[Agentforce for Financial Services](#)



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