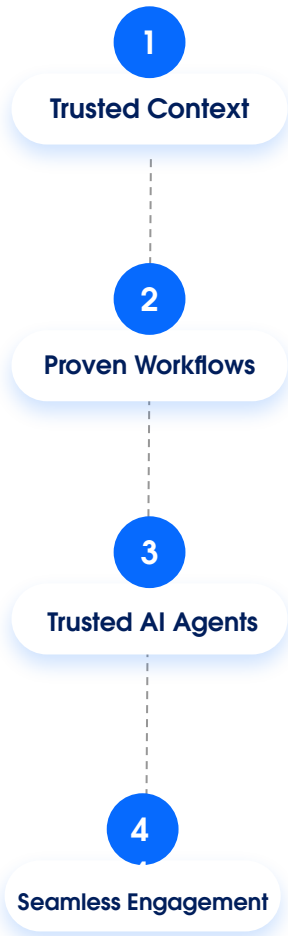




# Become an Agentic Insurance Enterprise. Put humans and AI agents to work — together.

Insurance carriers and MGAs face mounting pressure: rising combined ratios, accelerating climate risk, policyholder expectations for instant digital experiences, and a workforce stretched thin across underwriting, claims, and distribution. The answer isn't more point solutions – it's an Agentic Enterprise architecture built for insurance. Salesforce Agentforce 360 for Financial Services unites the four systems every carrier needs to become an Agentic Insurance Enterprise: a system of context powered by Data 360, a system of work built on 27 years of proven insurance workflows, a system of agency that puts AI agents to work across underwriting, claims, and distribution, and a system of engagement where every human and agent collaborate in the flow of work – all on one trusted platform.



## Power AI with Trusted Context

Connect policy admin systems, claims platforms, billing data, and third-party enrichment sources into a single, trusted view of every policyholder and risk. Data 360's zero copy architecture turns structured and unstructured carrier data – including inspection notes, loss runs, and claim documents – into real-time context that powers every AI agent and underwriter decision.

## Run Your Business on Proven Insurance Workflows

Put 27 years of codified business logic to work for carriers. Agentforce Financial Services and the Digital Insurance Platform define how insurance work runs – with rules, approvals, and handoffs built for underwriting, policy administration, and claims – so your team can collaborate with agents at every step without ripping and replacing what already works.

## Build and Deploy Trusted Insurance AI Agents

Deploy AI agents that understand the insurance business – autonomously handling FNOL intake, submission triage, proof of insurance requests, and producer onboarding 24/7. Agentforce delivers predictable, trusted outcomes every time, with the guardrails and transparency carriers need to meet regulatory and compliance requirements.

## Engage Every Policyholder and Employee

Unite every producer, adjuster, underwriter, and policyholder in a seamless experience across voice, chat, mobile, and web. Slack brings humans and agents together in the flow of work – so your teams stop chasing tasks across systems and start focusing on the complex, high-value work that requires human judgment.

## See what's included in this solution:

**Agentforce Financial Services** purpose-built industry functionality allows you to drive efficiency, sales growth, and connected customer engagements – fueled by AI and the Trust Layer.

**Data 360** connects web, mobile, API, CRM, and real-time data to give teams a complete picture of every policyholder. Make every customer touchpoint hyperpersonalized and build stronger relationships at scale.

**Digital Insurance Platform** enables end-to-end management of core insurance operations spanning product development, quoting, policy administration, and claims.

## How can this solution help your business?



increase in sales revenue\*



decrease in service/support costs\*



increase in employee productivity\*

\* FY26 Customer Success Metrics

# Data, Agentic Service, Sales, and Marketing Solutions

## Data-Driven Policyholder Engagement

**32%** increase in marketing ROI\*

### Unified policyholder data with Data 360

Bring together fragmented data from legacy policy admin systems, claims platforms, billing systems, and third-party sources to create a single, trusted view of every policyholder, household or business. Data Cloud's zero-copy architecture means no data movement, no latency – just real-time intelligence where your teams need it.

### Activate data across sales, service, and marketing

Give underwriters, service reps, and producers a complete view spanning in-force policies, claims history, billing, and life events. Deploy Agentforce Marketing to run AI-fueled, data-driven campaigns with deep segmentation and personalization that drive growth and reduce lapse rates.

## Next-Gen Insurance Service

**33%** improvement in customer satisfaction (CSAT)\*

### Agentic service and contact center

Deploy AI agents to autonomously handle routine policyholder inquiries – FNOL intake, proof of insurance requests, policy change confirmations, billing questions – 24/7 across voice, chat, and SMS. Agentforce Service agents resolve issues, initiate handoffs to human reps when needed, and generate AI-assisted summaries and knowledge articles automatically.

### Automation and self-service

Use guided service interactions to resolve complex transactions via a modern UI. Access the Insurance Process Library with prebuilt workflows for ID card requests, policy quotes, FNOL claims experiences, and more. Empower policyholders to self-serve through digital channels – reducing cost-to-serve while improving satisfaction.

## Optimize Distribution Management

**30%** increase in sales productivity\*

### AI-powered sales acceleration

Equip your territory managers with Agentforce Sales, predictive AI, and automation to optimize agency and wholesaler relationships. Analyze and score distribution partners, identify at-risk accounts, and automate meeting prep and follow-ups with generative AI.

### Intelligent territory and mapping tools

Boost efficiency with intelligent territory planning and route optimization. Visualize agency performance data to fuel faster, smarter decisions and streamline field operations.

### Broker onboarding optimization

Make it easy for producers to sign up through an interactive portal. Use AI-recommended actions to strengthen relationships, plan training activities, and monitor producer performance from a single dashboard.

## Modernize the Agent Experience

**29%** increase in sales pipeline\*

### Connected sales and marketing for captive agents

Enable efficient, data-driven sales and marketing outreach from one platform. Review, score, and deliver leads via predictive AI. Return high-potential but immature leads to Agentforce Marketing for further nurturing.

### Insight-driven agent outreach

Empower captive agents with content, resources, and Agentforce tools to automate on-brand policyholder engagement. Access out-of-the-box dashboards to surface insights, manage attrition risk, and drive proactive outreach.

### Integrated quote-to-bind

Deploy digital quote-to-bind processes and digital experiences for customers, producers, and internal users – directly from your Agentforce Financial Services desktop.

# Underwriting, Claims, and Core Policy System Solutions

## Automate Underwriting

**60%** reduction in underwriting time\*

### AI-powered underwriter desktop

Give underwriters a single-view command center with intelligent queues, workflow automation, and real-time analytics. Agentforce surfaces the next best action for each submission, flags referrals automatically, and tracks business flows by source and underwriting stage – reducing cycle times and improving risk selection.

### Digital quote-to-bind

Provide submission access via portal, mobile app, or API with dynamic data enrichment. Drive straight-through processing of digital applications, automate referral routing, and accelerate bind times with Salesforce's Digital Insurance Platform.

## Automate Claims

**26%** decrease in service/support costs\*

### Agentic claims desktop

Deploy AI agents to autonomously handle FNOL intake, claimant status updates, and routine adjuster tasks 24/7. Enable claims teams to collaborate and deliver next best actions from a single view with full omni-channel access – including voice, chat, and mobile.

### Field claims tools

Provide field adjusters with tools that organize, streamline, and automate workflows. A robust set of objects – including work orders, service appointments, and inspection records – keeps field operations efficient and connected.

## Digitize the Core

**30%** reduction in IT costs\*

### End-to-end policy administration

The award-winning Salesforce Digital Insurance Platform delivers complete policy lifecycle management – from coverage development and policy rating to quoting, underwriting, issuance, and billing. A highly configurable, cloud-native platform purpose-built for carriers drives retention, accelerates time-to-quote, and eliminates legacy system complexity.

## Enable the Digital Direct Insurer

**29%** increase in year over year (YOY) digital revenue\*

### Consumer quoting and claims

Enable consumers to purchase insurance, manage policies, and submit claims through an end-to-end direct-to-consumer digital experience. Power Agentforce Marketing to drive prospect conversion, improve upsell and cross-sell, and strengthen long-term retention.

## Streamline Benefits Design & Enroll

**30%** faster collaboration\*

### Census and contract management

Digitally manage and upload census information across business lines and create employer contracts from validated quotes.

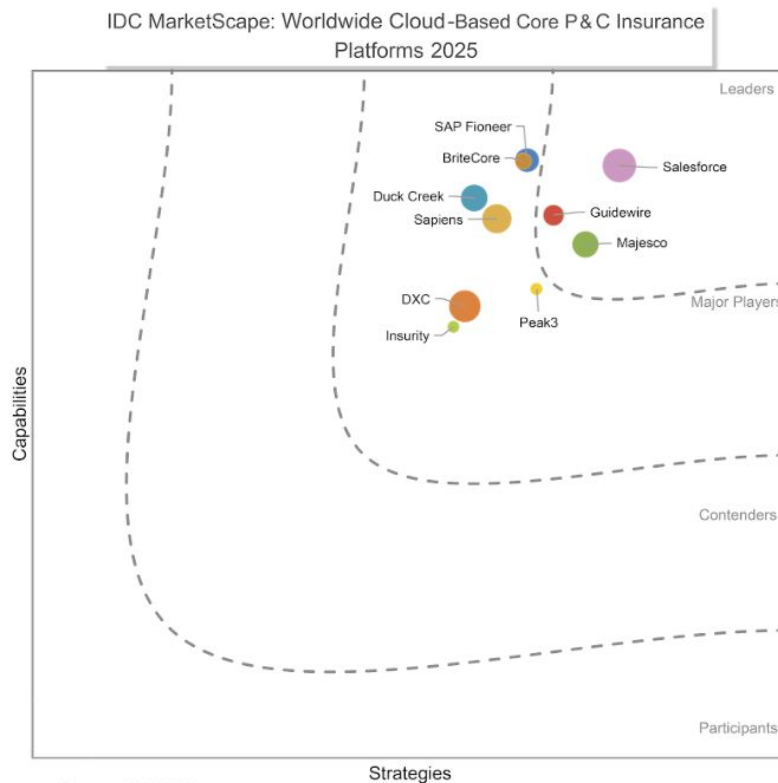
### Benefits enrollment

Create a modern, rules-based enrollment experience that reduces contract cycle times and ensures compliance and accuracy.



# 2025 IDC MarketScape Worldwide Cloud Based Core P&C Insurance Platforms

Salesforce Recognized as a Leader in P&C Insurance



**”Salesforce Digital Insurance should be considered when an insurer prioritizes scalable digital distribution, rapid process innovation, cross-functional integration, and AI-driven automation, particularly where a global ecosystem and robust CRM capabilities are important, and the business seeks a platform for ongoing DX.”**

**SOURCE:** “IDC MarketScape Worldwide Cloud-Based Core PC Insurance Platforms Vendor Assessment 2025, October 2025, IDC #US52985825

IDC MarketScape vendor analysis model is designed to provide an overview of the competitive fitness of technology and service suppliers in a given market. The research methodology utilizes a rigorous scoring methodology based on both qualitative and quantitative criteria that results in a single graphical illustration of each vendor's position within a given market. The Capabilities score measures vendor product, go-to-market and business execution in the short-term. The Strategy score measures alignment of vendor strategies with customer requirements in a 3-5-year timeframe. Vendor market share is represented by the size of the circles. Vendor year-over-year growth rate relative to the given market is indicated by a plus, neutral or minus next to the vendor name.



# The Salesforce Platform for Insurance Carriers and MGAs

## 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

Purpose-built industry functionality including Agentforce Sales and Service capabilities to drive efficiency, sales growth, and connected customer engagements – fueled by AI and the Trust Layer.

## Agentforce Sales

Simplify and manage the entire sales cycle – from prospecting to upselling and cross-selling. Automate manual sales processes, inspect pipelines and forecasts, and connect customer touchpoints.

## Agentforce Service

Scale service while maximizing efficiencies from the contact center to the field. Manage critical touchpoints to provide seamless customer experiences including self-service, field service, and omni-channel communications.

## Agentforce Marketing

Save time, increase efficiency, and meet customers on email, web, social, and mobile. Unified analytics and AI help maximize every dollar of campaign spend – with fully integrated lead management.

## Slack

Simplify communication and information sharing across your ecosystem. Connect teams, customers, and partners in a fast, flexible, and inclusive digital workspace.

## Salesforce Platform

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

## Data 360

Connect web, mobile, API, CRM, and real-time data to give teams a complete picture of every policyholder. And now with Informatica, every Agentforce interaction and producer touchpoint is grounded in a single, trustworthy version of the truth.

## Digital Insurance Platform

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

## 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

Real-time analytics and next best action insights across 360-degree views of accounts. Predict policy churn or likelihood to renew, track operations, and monitor business performance.

## Agentforce Field Service

When catastrophe strikes, speed matters. Gives adjusters, inspectors, and contractors mobile-first tools with real-time claim details, intelligent scheduling, and automated work order management.

## Experiences

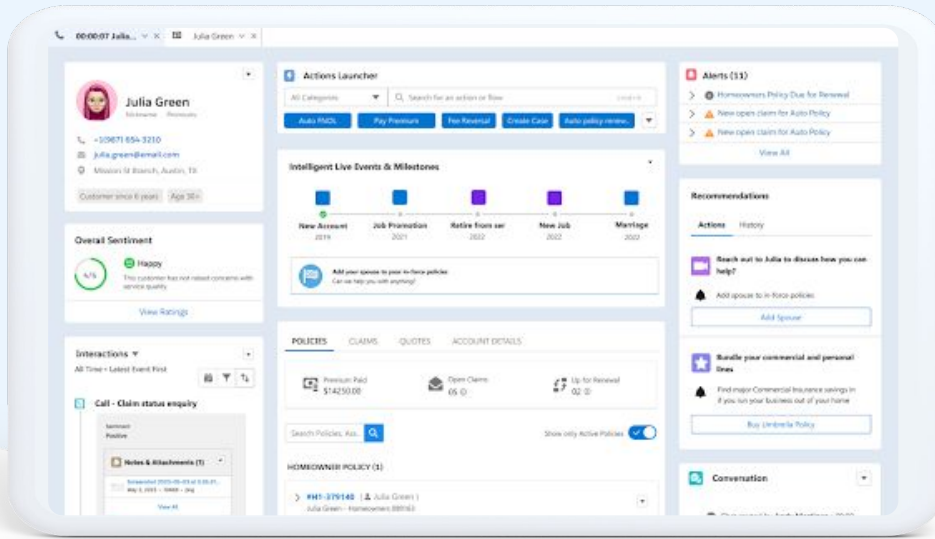
Quickly create industry-best digital experiences including agency portals and policyholder self-service portals. Use out-of-the-box templates or customize fully for faster time to value.

## Agentforce Commerce

Build seamless B2C and B2B commerce experiences that help grow revenue, engage customers, and connect commerce to the rest of the business.

## AppExchange

The most trusted enterprise cloud marketplace with 7,000+ apps and certified consulting partners. Includes Shield for enterprise security and Hyperforce for local data residency.



# Ready to become an **Agentic Insurance Enterprise?**

Salesforce is the world's #1 AI CRM – and the only platform purpose-built to connect your carrier's front office, core operations, and data foundation on a single agentic platform. Recognized as a 2025 IDC MarketScape Leader for Cloud-Based Core P&C Insurance Platforms, Salesforce is trusted by carriers worldwide to drive profitable growth, reduce operating costs, and deliver exceptional policyholder experiences.



[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 the demo](#)

Watch our [Salesforce for Property & Casualty Insurance Carriers Demo](#) or our [Salesforce for Life & Annuity Insurance Carriers Demo](#) to see how it can help your organization