salesforce Reimagine Insurance

The Insurance Success Platform

Commercial Lines

JOURNEY

Business Client

Analyze Risks and Determine Requirements

Size the Exposure and Seek Advice

Execute Risk Mitigation Strategy

Monitor Risks, Events, and Business Impact

Engage

Advise

Execute

Drive Insights

Broker / Agent

Drive Awareness and Educate Prospect

Provide Expertise to Evaluate Risks

Provision Insurance Products and Consulting Services

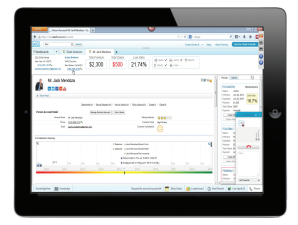
Identify Opportunities to Grow the Account

CAPABILITIES

Policyholder Journeys

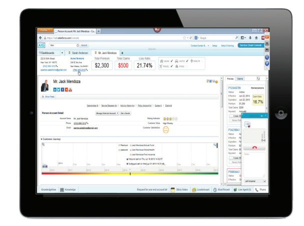
Map the customer experience and deliver relevant content at the right moment.

360 View of Policyholder



360 view of commercial policyholder's activities, claims, policies, etc

Expert Employee Network



Identify and introduce the right product specialists into the account team no matter where they are based.

Executive Dashboard

Timely info to monitor and compare performance.

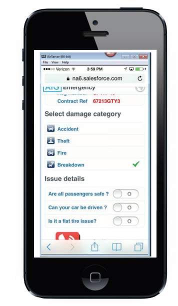
Track Interests by Segment

Align the right content based on interests, needs, and risks of commercial policyholders.

Prioritize & Cross-Sell

Cross-sell specialized offerings based on the unique requirements of the policyholder.

Manage Contracts



Policyholders and Advisors can access paperless documents in one place, on any device.

Leverage 3rd Party Data

Leverage 3rd party sources for crisis management or ongoing monitoring of risk.

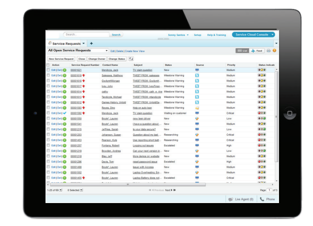
Content & Microsites

Direct key prospects and segments to microsites with tailored content and offers.

Interactive Advice

Context-relevant and engaging content delivered interactively.

Track Deal Progression



Track advancement of opportunities in the sales cycle, and take action where and when needed.

Next Best Action

Provide timely, accessible, and easy to understand insights that account teams can act on.

salesforce marketing cloud

salesforce sales cloud

salesforce community cloud

salesforce analytics cloud

INSIGHTS

97% OF CLIENTS WANT BROKERS TO HAVE A **"THOROUGH UNDERSTANDING OF OUR BUSINESS"**

31% OF CLIENTS ARE **UNSATISFIED** WITH THEIR BROKER'S UNDERSTANDING OF THEIR BUSINESS

94% OF CLIENTS WANT **PROACTIVE UPDATES** ON EVENTS THAT IMPACT RISK AND COMPLIANCE

Success Stories

Collaborate to Drive Sales

AON

- Capture opportunities using mobile with "as few clicks as possible."
- Opportunity workflows with email alerts to internal team based on program, product, and location.
- Individual and team dashboards.

Create & Convert Leads

ZURICH

- Dynamically score prospects based on elements such as SIC.
- Customize evaluation criteria.
- Nurture prospects with relevant content.
- 360 view of pipeline and clients.

Sales & Underwriting Discipline

CNA

- Analyze distribution, local market, and agency intelligence.
- Segment producers and plan at an individual and agency level.
- Evaluate progression of sales calls, cross-sell, and pipeline.