



Engage

Advise

Issue Policy

Analyze & Grow

Service & Renew

Social Listening
Uninvasively listen and respond to customer social media posts.

Customer Journeys
Map the customer experience. Define events and actions.

Customer Life Events
Marriage, children, travel, new homes - anticipate questions and give context-sensitive advice.

Connected Things
Wearables and incentives that encourage healthy lifestyles.

360 View of Customer
360 view of customer activities, claims, policies, etc

Mobile Insights
Insights. Customer and household. Anytime. Anywhere.

Lead Prioritization
Lead scoring and routing to the right person.

Productivity Tools
Customer feedback; agent performance dashboards.

Instant Quotes
Respond quickly with quotes to any device, any time.

Manage Contracts
Customer access to paperless documents in one place, on any device.

Integrate
Leverage legacy systems and previous integrations.

Underwrite Closer to Frontoffice
Shift more resources to complex tasks valued by customers.

Executive Dashboard
Timely info to monitor and compare performance.

Expert Employee Network
Share knowledge and work together on complex problems.

Interactive Coaching
Context-relevant and engaging content delivered interactively.

Next Best Action
Target offers. Right customer. Right time.

One-Stop Service
One-and-done, one stop service through multiple channels.

Proactive Care
Delight customers when they feel most vulnerable. Be the hub of provider services.

Activity Tracker
Deflect calls with 24/7 access to latest status of claim, policy, service request.

Multi-Cultural Contact Centres
Adapt to language, currency, and local practices.

salesforce marketing cloud

salesforce sales cloud

salesforce community cloud

salesforce analytics cloud

salesforce service cloud

ECOSYSTEM

Real-time Chat with Insurance Advisor
Friend Referrals & Incentives

Mobile Policy Recommender & Configurator
Commission & Incentives Tracker

Broker/Agent FAQ Community
Underwriter Decision Console

Productivity Incentives
Contract Management

Coaching and HR App
Performance Dashboard

Policy Renewal Manager
Service & Claims Activity Tracker

INSIGHTS

63% OF LEADS FALL THROUGH THE CRACKS AND ARE NEVER FOLLOWED UP ON.

80% OF CUSTOMERS CITE PERSONALIZED SERVICE AS A REASON FOR SWITCHING INSURERS.

67% PEOPLE AGED 18-33 WOULD CONSIDER PURCHASING INSURANCE FROM THESE COMPANIES.

33% WILL PURCHASE VIA MOBILE