

A Leading P&C Insurer Improves Its Agent Productivity By 40% By Implementing Salesforce Financial Service Cloud

Supported By Robust Salesforce Managed Services



The Client Profile

The client is one of the largest property and casualty insurance company operating in the United States since 1920s. They have been providing coverage to homes, small businesses, farms, and churches through their extensive network of independent agents across 8 states. As a well-known insurance brand, the client is rated “A” (Excellent) by A.M. Best, which reflects its stability, consistency, and financial domination over the long term.

The Need for a Full-Fledged Platform To Keep Track of Agents, Agencies and Their Customer-Facing Operations

The client’s massive success was dependent on revenue generated by agents and agencies. The core problem of the client was the inability to track and monitor the operational progress made by enrolled individual agents and agencies leading to chaos. The agents also required a user-friendly system to capture the details of their visits to insurance customers and track the progress of claims processing effectively. Overall, the client was not able to get any accurate single view on the metrics related to the agent-driven operations including agent-wise customer mapping and policy sold, agency-wise enforced policies and direct written premiums, etc.



Difficulty in tracking agents- and agencies-wise operations



Absence of a holistic view on agents and customers they handle



Agents unable to track progress and process their customer visits



No information on agency-wise business implications

The Solution

Full-Fledged 360° Solution for Agency Business Process:

■ A Full-Fledged Self-service and 360° Platform to Better Track Agents-driven Operations

Damco worked with the client to implement a full-fledged Salesforce financial services cloud platform to track agents and agencies' process and progress seamlessly. Through the self-service platform the agents managed the entries related to customer visits such as the details of a customer, the insurance products involved specific to the visit, ordering, claim requests & complaints. The platform also helped the agents generate automated Agreements in PDFs specific to each States in US. Therefore, the client was able to get accurate information on mapping between agents and their customer as well as track the performance of the agents based on the insurance products they sold.

■ Provided Visibility to Customer Visit Information for Tracking Progress of Claims Process

The robust platform sent a weekly customer visit reports that enabled the agencies to see the overall event created for their agents. Through the reports, the agents also managed to track the claims progress or any notes related to their visits.

■ Custom Reports to Help Business Decisions Across 8 States

The platform also enabled the agencies across the eight states to send custom reports in form of images using AWS S3 storage service for tracking compliances across their corresponding territories. These reports also helped the client get a holistic view on newly enforced policies and directly written premiums.

■ Robust Salesforce Maintenance and Support Services For A Better Salesforce Experience

Damco helped the client achieve peak performance of Salesforce system with a flexible, robust and resilient 24*7 tailor-made Salesforce managed services. Damco also provided certified salesforce developers and consultants to address a complex project activity and deal with complex and multiple scenarios increasing the overall ROI of the system.

The Benefits

A 360° Platform That Handles Process for Agents and Agencies

- ▶ The streamlined agent operations improved the time taken to process claims request and response by 30%.
- ▶ The productivity of the agents improved by 40% as the weekly reports were produced to help them better track their visits and create next visits quickly and effectively
- ▶ The platform also enabled the agents and agencies to track contacts, claims, and respective ownerships, improving the overall accountability and allocation of resources.



- ▶ Increased productivity of the client's existing IT team with enhanced support from Damco through a flexible, robust, and responsive managed service solution.
- ▶ Increased ROI from Salesforce investments with better user adoption and overall performance.

Learn How Salesforce Could Improve Productivity of Your Revenue Generating Teams

Talk to our Salesforce experts

About Damco

Damco Solutions is a strategic Salesforce partner and holds consulting and technology expertise across the Salesforce ecosystem. Damco helps businesses boost productivity and realize the true potential of their Salesforce platform to maximize their investments. Contact Damco to learn more about the services and solutions that can help transform and build a customer-centric digital-first organization.

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