Leading P&C Automobile Insurer Simplifies Lead Management & Agent Onboarding Journey with Salesforce Sales Cloud & Lightning Experience

More Efficient Onboarding Process. Improved Performance. More Cost Saving.

DAMCO
Ensuring Your Success, Always.

Client Profile

The client is a United States-based leading property and casualty (P&C) insurance company, focusing primarily on automobile insurance. Established in the 1980s, they rank among the top privately held property and casualty insurers in the United States, offering affordable, premium-quality insurance solutions tailored to the non-standard automobile insurance sector.

The Problem

The client wanted to improve their agent on boarding journey and interactions; however, certain bottlenecks posed by the existing complex and non-mobile-friendly- legacy system made this process a tedious one. Moreover, the absence of any central data repository made agent data management inefficient with limited reliability and reporting capabilities. To mitigate all these challenges, the client decided to replace their existing legacy system with a solution based on the Salesforce technology platform to simplify their agency and agent onboarding segment processes.

Absence of a user-friendly agent onboarding process: There was an apparent lack of an intuitive and responsive agency and agent onboarding process. The existing process was supported by a legacy system with tedious workflows, which made the entire onboarding process cumbersome.

Sluggish communication channels: The current intermediate communication channels utilized during the agent onboarding journey were slow and inefficient, leading to delays in the agent onboarding process.

Inefficient data management: The entire business-critical data, including agent and agency details, and financial details was stored in silos with no central data repository acting as a single source of truth.

Unreliable and limited reporting capability: All reports were generated via MS Excel which limited the scope of analysis of the data for further business insights.

Legacy system for agent and agency onboarding and management processes	Inefficient intermediate communication during onboarding process	Inefficient data management due to lack of a central data repository	Unreliable legacy reporting system

The Solution

After careful consideration of the client's business challenges and unique requirements, Damco's team of Salesforce experts decided to replace the existing legacy system with a Salesforce instance while migrating the lead management and agency and agent onboarding processes on the Salesforce org.

Implementation of Salesforce Lightning compatible Salesforce Sales Cloud

- Our Salesforce team utilized Salesforce Sales Cloud to implement end-to-end agent onboarding journey, from lead to finalization, on Salesforce with several configurations and customizations.

- The team ensured the application is Salesforce Lightning compatible and accessible through mobile app as well.

Integration of Salesforce application with existing AS400 system

- We integrated Salesforce with AS400 system in real time to ensure the client's database remains updated across both systems.

Business-critical data capture

- The implemented lead management application captured the enlisted agent as well as agency details, enriched the data with other necessary information, and processed it at different stages before it was converted into properly formatted data for the client.

- The application also captured financial data, including the current and previous year's business with the agents, and stored it in a single system (Salesforce platform), which would be the single source of truth.

Deployment of optimized code coverage

- Damco's team ensured the optimized code coverage for the new Salesforce org structure through configurable parameters that support easy and seamless deployments of all future releases and updates.

The Benefits

The consolidated efforts of web researchers, callers, leads, and project manager, verified and validated the healthcare providers' data while updating the existing database with the latest and accurate information to improve the data quality.

Faster Onboarding Process: The Salesforce-based agency and agent onboarding application ensured a simplified and swifter lead management and onboarding process while connecting the entire related communications.

Improved Performance: The Salesforce-powered application significantly improved the performance of agencies and agents as they were able to access the required data and reports in just a few clicks through the highly intuitive interface of the centralized app.

Advanced Dashboards & Better Reporting: Improved decision- making with better insights as the platform provided the client with more sophisticated reports and tailored dashboards.

Improved User Experience: The deployment of Salesforce Lightning ensured a highly intuitive and consistent user interface across multiple devices, including laptops, mobile apps, and tablets, which significantly improved user experience.

Reduced Operational Costs: With Salesforce as the central data repository, the client got quicker access to the latest and previous year's financial details along with in-depth insights into the unique relationship among the interconnected data, which helped them reduce their overall cost.

Salesforce Sales Cloud and Lightning Powered App for More Efficient and Simplified Agent & Agency Onboarding Process and Intermediate Communication

Connect With Our Salesforce Professionals

About Damco

Damco Solutions is a strategic Salesforce Gold Consulting Partner and holds 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 customercentric digital-first organization.

Contact us for more information on Damco's Offerings.

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