Insurance Agent/Broker Blueprint

salesforce service cloud | **salesforce** sales cloud | Industries OFFICIAL | **salesforce** financial services cloud

Marketing: Lead to Prospect	Prospect to Qualified	Quoting & Submission	Policy Admin	Accounting & Billing Servicing	Servicing	Retain & Grow / Manage Business
Campaign Management	Lead Management & Prioritization	Personal Lines and Commercial Lines Comparative Rating	Carrier Downloads**	Automatic Commissions Calculations	Claims Tracking	Customer Retention
Opportunity Management	Producer Goal-Setting	Acord / Submissions / Applications	Policy Changes / Endorsements	Direct Bill Calculations	Self-service Customer Portal	Up-Sell / Cross-Sell
Customer Journey Management	Qualification / Data Capture	Submissions Tracking / Tracking *	Generate Certificates and Auto IDs	Agency Bill Invoicing and Receipts	Activities and Tasks	Production Reporting
Social Monitoring & Analytics	Prospect Analytics	Remarket	Insurance Document Management	Insurance Financial Reporting	Cases (Service cloud)	User Specific Productivity Dashboards

* Veruna supports BOTH P&C and Benefits *integrated together in one UX* – **this is unique in the industry**

** Veruna is the **ONLY AMS** that supports carrier downloads directly into Salesforce (a <u>requirement</u> for any P&C agent/broker)

Insurance Agent/Broker Platform Enablers

Customer 360 | Journey Management | Workflows/Automation | Activity Orchestration | Intelligence/Analytics & Reporting | Insights | Alerts/ Notifications | Veruna Download Inbox | Veruna Acord Form Integration (with storage)| S-Docs and S-Sign | EinsteinGPT | CRMA

API & Data Sources

IVANS, PL Rating, Bold Penguin, ACORD forms