

We help insurance agents and brokers grow their business.

Built on Salesforce, Veruna is the only 100% native agency management system (AMS) that provides real-time updating, carrier downloads, and ACORD forms while integrating mission-critical business KPIs for real-time, actionable insights.

Ideal Partner Customers: Independent insurance agents or brokers, 30-1000 users

KEY FEATURES

Integrated Downloads: ONLY Veruna offers this essential capability, enabling users to integrate policy data from carriers directly into Salesforce with real-time updates (IVANs and others).

Full Policy Lifecycle: Delivering a complete Customer 360 view, Veruna empowers agents to see and leverage crucial data at every stage: prospect, quote, close, policy change, remarket, renew.

Producer Performance: Agencies live and die by sales, and Veruna makes it possible to define, automate, monitor, and optimize the sales process with real-time, actionable insights.

Stellar Retention: With easily customized remarketing and renewals, Veruna helps agencies create customers—and recurring revenue—for life.

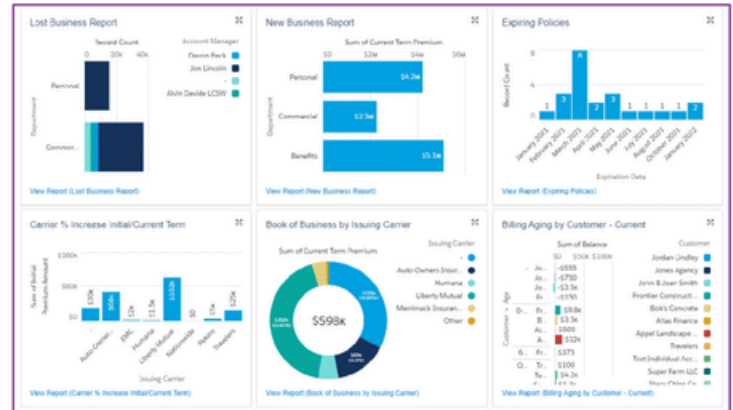
Accounting Tools: Veruna has commission calculations, direct bill, agency bill, broker bill, and more.

ACORD Integration: Seamless integration with ACORD makes it simple to find, access, create, and update policy forms without leaving Veruna.

Transformative Tech: Independent agents and brokers need to embrace technology (as their customers and competitors have) to survive and thrive. Veruna makes it easy to adapt to this new reality, with intuitive tools for sales, service, policy submission, accounting, and team and company management.

Integrated P&C and Benefits: Agents no longer need to log in and out of disparate systems—Veruna can report on all policies within a single, comprehensive solution.

CUSTOMERS LOVE VERUNA



CUSTOMER SPOTLIGHT

The Paladin Group is a growing commercial, business, and personal auto insurance agency with offices in three Iowa cities.

"We grew our revenues 600% in the first year of having Veruna, and we have line of sight to 300% growth in the second year."

—Corey Schatz, Founder and President, TPG

[Read the full case study](#)

INDUSTRIES

- Independent Insurance Agencies
- Insurance Brokers with independent agency business
- Insurance Carriers with independent agency distribution models



*"When selecting new technology solutions, we are conscious of how the change will impact our employees, workflows, speed to market, and member experience. We felt strongly about getting a solution that was **insurance-specific** and allowed us to easily customize when necessary."*

—Jason Haines, Assistant Vice President, USAA

HOW WE HELP AEs

Close and Implement Faster: Win customers by giving them 90% of what they need out of the box, vs. a long, painful path to arrange plugins and workarounds. Integrated downloads are essential for agencies, and ACORD form integration is a game-changer. Veruna gets customers up and running in weeks, not months.

More Licenses: Each Veruna seat requires a Salesforce license (OEM, Sales Cloud, Service Cloud) vs. selling licenses for a small subset of users (connection seats to non-native apps). PLUS Veruna will be with customers on their journey to Financial Services Cloud!

Upsell Easily: Upsell to Experience Cloud, Einstein, Marketing Cloud, Pardot, and other Salesforce enablers.

PRODUCT BENEFITS

- Seamless AMS-CRM interoperability, since Veruna is built natively on Salesforce and enables users to harness the full power of the platform
- Policy admin within the CRM, including robust reporting on pipeline, book of business, close rate, retention rate, and performance by agency, branch, department, profit center, and line of business (actionable data and metrics)
- Real-time visibility for users, managers, and executives
- Alignment across functional areas (sales, servicing, bookkeeping, etc., eliminating silos)

WHY VERUNA?

Veruna is an AMS built natively on Salesforce to help independent agents and brokers sell more policies, retain more customers, eliminate team and platform disconnects, identify and address threats and opportunities, and drive rapid business growth.

KEY SALES PLAYS

Think of Veruna when you hear...

	Independent Insurance Agency / Broker	Agency Division (of Carrier / Wholesaler)	Business Data / Analytics
Business Challenge	Need a system tailored to insurance agency business model and operations, not another force-fit grab-bag of costly connectors and cumbersome workarounds.		Need to see accurate, timely business data without navigating disparate systems or manually shuffling spreadsheets.
Buyer	<ul style="list-style-type: none">• Principal• VP of Sales / Operations• CTO• COO	<ul style="list-style-type: none">• COO• IT / Operations• Innovation Leaders	<ul style="list-style-type: none">• CEO• COO
Required	Works well with Sales and Service Clouds	<ul style="list-style-type: none">• Better with Sales or Service Cloud• Potential FSC partner w/ custom implement.	Significantly better with Sales Cloud

UPSELL OPPORTUNITIES

If your customer needs Veruna, they might also need...

- Sales Cloud for leads, campaigns, sales activities
- Experience Cloud for customer portals / interaction on policies or accounts
- Service Cloud for endorsement / claims servicing

TAKE THE NEXT STEP

Visit Veruna.com/SF for info, resources, and more.

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