

A Unified Salesforce Implementation for a Leading Life Insurance Company

This client is a holding company for a family of firms with \$82 billion of insurance in force providing insurance coverage to 4.2 million policyholders. Its subsidiaries offer whole and term life insurance, supplemental health insurance, accidental death insurance, Medicare supplements, long-term care health policies for the elderly, and life insurance policies to labor union and credit union members.

The client made use of Salesforce for one of their subsidiaries, and had often considered implementing it individually for the others. They knew that Salesforce could solve many of their problems but they kept evaluating it as a single point solution for each subsidiary.

There existed numerous disparate systems that kept them blind to data that could be shared across the enterprise. Many of their processes were manual, done differently in different parts of the organization, with no visibility outside of those who managed them.

Global goals, granular assessments

Silverline started with an Advisory engagement, and after assessing the current state, proposed a more global view of their organization, with a unified Salesforce implementation connecting their separate divisions of business.

From that engagement, Silverline was brought on for a multiphase approach to implementation. The first phase acted as a more tactical exploration of what needed to be tackled first and in which subsidiaries. The next phase involved implementing their CRM along with communities

About Silverline

With significant expertise in the Financial Services industry, including banks and credit unions, mortgage companies, wealth management firms, investment banks, hedge funds, and insurance companies, Silverline combines Strategic Advisory, technical implementation, and ongoing Managed Services to enable organizations to achieve maximum value with the Salesforce platform.

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for their substantial recruiting needs. Subsequent phases will include customer communities as well as Service Cloud.

The customer executive team defined two goals for the program.

1. Develop better engagement channels for clients and agent recruits, especially digital channels, for greater flexibility and automation.
2. Develop greater capacity for intelligence, generating and harvesting data from engagement activities that will in turn enable the organization to act smarter as a means of driving improved outcomes; this includes improved efficiencies in identifying and onboarding new agent recruits.

The executives also identified three primary project areas for which they wanted to plan collectively, in order to minimize silos and maximize the value of their Salesforce.com investment. These priorities include:

- Customer Portal
- Agent CRM
- Recruiting Journey

Smooth transitions

The client is also considering Navigator, Silverline's Managed Services offering, to provide consistency and clarity through the ongoing growth and maximization of their system.

To find out more and get pricing information, contact us at financialservices@silverlinecrm.com

