

## How Legal & General America Up-Leveled their Sales Process with Salesforce

Legal & General is one of the world's leading multinational financial services companies — and has been since 1836. Headquartered in London, the firm is the ninth-largest global insurer, with more than \$1.5 trillion in total assets under management. Legal & General America (LGA), their U.S. division, has provided life insurance and other financial services to Americans for more than 70 years.

Despite its notable history, the company became burdened with legacy systems. Four years ago these systems weren't able to meet the moment for LGA's fintech growth ambitions. As marketing and sales efforts expanded, new systems and processes needed developing.

The company built a Direct-to-Consumer (D2C) sales center from the ground up, choosing Salesforce as its backbone. As D2C scaled up, the B2B sales team also launched Salesforce. The teams leveraged the platform to drive and measure lead generation efforts for two sides of one house. As operation capabilities grew, their processes required more complex automations and collaborative thinking.

The need to build new ways of working to deliver the kind of digital-first experiences prospects and customers expect was clear. DevOps and security processes presented particular challenges across the two Salesforce environments. But a small team meant tackling complex system issues such as these would take up valuable time.

Salesforce Administrator Heather Shelton knew that they needed a trusted partner. And Silverline could help LGA make the most out of their Salesforce implementation. "As Salesforce adoption increased across sales and marketing at LGA, we wanted to scale existing processes, and build new ones to support our growth," she said. "In a competitive process, we chose Silverline to be an extension of our in-house Salesforce team."

### A unified view of their marketing efforts

Silverline first focused on an org merge, combining their B2B and D2C environments into one.

Merging meant LGA's marketing and sales teams could see a unified view of all of their activities, from acquisition campaigns to account management contact and pipeline progression. Now, they can tie their efforts across the marketing and sales mix to ROI and better understand exactly what's working and identify gaps to optimize.

### A clear internal process for ushering leads through the funnel

Here's how their lead process works: First, the marketing team generates a lead in Salesforce. Then a team member from LGA's in-house licensed insurance agents takes over. The agent moves the process along, helping the prospective customer get the life insurance they need.

The previous sales system experience made delivering a consistent and outstanding customer experience difficult.

There wasn't an efficient process from lead to sale for the agent. Improvements to the agent experience and streamlined processes made data capture easier. LGA agents can now spend more time focusing on meeting their prospective customers' needs.

Redesigning the complicated lead distribution process needed to reflect the needs of an evolving and maturing insurance sales center. This required a lot of back-and-forth and a deep understanding of the conversion goals. The result? A new logic that made converting from "interested" to "closed/won" easier and more effective.

"In our ambition to develop exciting new processes that support growth, we knew we also had some foundational work to do. We've leveraged Silverline's Managed Services and project engagements to move us forward," Shelton said. "As we expanded our Salesforce team from internal-only to allowing Silverline into our development workflow, we needed to improve our DevOps processes. As our projects increased in complexity, the Gearset tools became essential to move us forward seamlessly and successfully. As a non-programmatic developer, I didn't know how wonderful a better DevOps process would improve deployments. Thanks to Silverline, now I know!"

## Added security from Shield

One of the critical elements for any insurance carrier is security. LGA needed certainty that their data security complied with financial industry standards. "The more growth, the more risk exposure," said Shelton. "We needed to make sure we took care of our client data and our own, mitigating that risk. We already had Shield from Salesforce, and Silverline helped us optimize it."

Silverline partnered with RevCult to perform a security risk assessment, who provided action items for LGA. The team worked on improving their system, protecting sensitive customer information with tighter security and added encryption.

"Phase I of our implementation included a workshop, purchase of the Security Cockpit, data classification, and encryption," said Shelton. "Data classification and encryption are not a one-time event. They are an ongoing management effort that takes the right people to help you with lift-off. Across the board, the Marketing Analytics, CISO, and InfoSec teams were pleased with the experience, expertise, and outcome."

Members from across the organization attended the workshop and stayed connected through later phases of implementation. Learning every element of security, from data protection to integrations and monitoring insights. Not only did this help the organization get up to speed on Salesforce-compliant policies, it improved workflows to meet the changing demands of their remote workforce.

"The data classification work was customized and thorough. We have implemented several phases of our encryption playbook. I can't imagine there is a better way to implement

and manage Shield than the RevCult approach," she said. "If you need to implement Shield, do yourself and your organization a favor and work with the teams at Silverline and RevCult."

## Building a foundation for personalized, digital customer experiences

All this added up to a foundation for growth, and in less than a year. Vice President of Customer Experience Steve Burton said, "I've been really pleased with the progress we've been able to make together, helping to ensure our LGA mission to protect more families is supported by an experience backed by leading technology and security solutions."

Added Shelton, "Not only have they been great partners, but Silverline has taught me so many things and changed the way we think about Salesforce as part of our success. Until our partnership with Silverline, we only ever invested in licenses and back-up services and now the organization understands how well-spent money can truly drive a return on our investments."

More than anything, the team is excited about how this translates to a faster, more streamlined Salesforce org that's poised to deliver best-in-class experiences. Said Shelton, "At LGA, we're excited about the Salesforce platform and continuing to leverage best-in-breed tools to empower our business and users to deliver world-class employee experience and customer experience in the insurance industry. Together with Silverline, I know I've got a team that will help us deliver the platform innovations we envision."

## About Legal and General America

At Legal & General America (LGA), our mission is simple. Protect more American families and businesses through life insurance. Our sole focus is to safeguard your financial well-being — and it has been for more than 70 years.

As one of the nation's strongest life insurers, LGA ranks as a top 5 life insurance provider in the US. Our long history of serving families and continued financial strength is our foundation.

We are a proud part of Legal & General Group Plc., which has been one of the world's leading multinational financial services companies since 1836. Headquartered in London, the firm has over \$1.5 trillion in total assets under management.

Legal & General America sells insurance products in all 50 states, including D.C., through our companies, Banner Life Insurance Company and William Penn Life Insurance Company of New York. <https://www.lgamerica.com/about-us>



## About Silverline

Silverline has real-world expertise in the Financial Services industry, including banks and credit unions, mortgage companies, wealth management firms, investment banks, hedge funds, and insurance companies. We combine strategic planning, implementation, and ongoing support to help clients realize continuous value with the Salesforce platform. To find out more, contact us at [financialservices@silverlinecrm.com](mailto:financialservices@silverlinecrm.com).