



Salesforce CRM Implementation for a Leading Global Insurance Group

Unifying multi-channel business data onto a single Salesforce platform to empower 1 million agents with automated workflows and personalized policyholder insights.

Overview

QBurst delivered a comprehensive Salesforce CRM solution to unify business data across corporate offices, call centers, and marketing divisions into a single platform. The integrated system automates lead processing and policy renewals, providing agents with a 24/7 detailed activity timeline for every policyholder to drive faster deal closures and hyper-personalized service.

- **Unified Data Ecosystem:** Consolidated data from 50,000 agencies and 1 million agents into a centralized, secure Salesforce environment.
- **Automated Lifecycle Management:** Streamlined the insurance journey through automatic opportunity closures upon payment and proactive policy renewals.



Client Profile

With a presence in 38 countries, the client is one of the world's oldest and largest non-mutual private insurance groups. Rated A+ by Standard & Poor's, they support over one million agents serving property-and-casualty policyholders with a legacy spanning more than 14 decades.

Challenges: Fragmented Data and Operational Overload

The client's reliance on disparate data sources hindered their ability to deliver tailor-made products at scale.

- **Lead Inefficiency:** Manual lead handling caused significant duplication and overloaded specific agents while others remained underutilized.
- **Mapping Discrepancies:** Offerings on the corporate website were not correctly synced with the CRM, leading to data gaps in the sales funnel.

- **Security & Visibility Concerns:** The client lacked a secure, centralized repository for sensitive policy reports and a reliable method for pipeline forecasting.

QBurst Solution: Integrated Salesforce Architecture

We established a robust REST-based integration between the client's online portals and Salesforce using standard APIs and custom web service classes. The solution leverages Apex triggers and metadata to automate the core insurance sales cycle.

- **Intelligent Lead Management:** Implemented round-robin scheduling to balance workloads and utilized Apex classes to identify and eliminate duplicate leads automatically.
- **Custom Product Mapping:** Set up specialized record types within Salesforce to ensure website products and relevant fields were mapped accurately for agent visibility.
- **Multi-Channel Integration:** Synchronized marketing and advertising tools, including Campaign Monitor and Facebook Ad Forms, for seamless data transfer into the CRM.
- **Automated Financial Workflows:** Integrated the online payment portal to trigger the automatic closure of opportunities and initiated automated policy renewals prior to expiry.

Key Features and Technical Highlights

The implementation focused on agent empowerment and high-level data visualization:

- **Dynamic Dashboards:** A multi-information display on the home screen provides real-time reports and status updates on all active policies and leads.
- **Lead Classification:** Automatically categorizes leads into accounts, contacts, and opportunities the moment a quote number is generated.
- **Custom Email Client:** Developed a bespoke email interface within Salesforce for agents to maintain personalized communication with prospects.

- **REST API Framework:** Exposed custom Apex classes as web services to facilitate secure, high-speed data exchange with external portals.

Impact: Accelerated Productivity and Market Agility

The transition to a unified CRM has standardized the agent experience and provided leadership with clear, actionable sales insights.

- **Significant Productivity Gains:** Achieved a 32% increase in sales productivity by eliminating tedious manual data entry and lead sorting.
- **Rapid Market Response:** Marketing teams can now deploy campaigns 55% faster thanks to integrated data flows from social and email tools.
- **Enhanced Performance Monitoring:** The centralized reporting suite enables accurate forecasting of future pipelines and real-time monitoring of agent performance across 38 countries.
- **Seamless Agent Experience:** Streamlined the workflow for over one million agents, ensuring consistent service delivery and increased customer satisfaction.