



salesforce

Implementation for a

Global Insurance Company

The Salesforce CRM solution empowered sales agents to accelerate productivity and close deals faster while delivering highly personalized products and services at scale.

Project Overview

We helped the client unify business data across touchpoints such as corporate and sales, call centers, insurance agencies, and marketing divisions onto a single CRM platform. The solution automates tedious tasks and maintains a record of each prospect and policyholder in a detailed activity timeline. This information is made available to agents within the organization 24X7 – enabling them to improve performance and boost sales.

Client Profile

One of the oldest and largest non-mutual private insurance groups in the world with over 50,000 insurance agencies and one million insurance agents. Currently active in 38 countries across the globe with 140+ years of experience serving property-and-casualty insurance policyholders.



Business Requirement

The client wanted to integrate data from multiple sources to Salesforce CRM to deliver tailor-made products and services at scale.

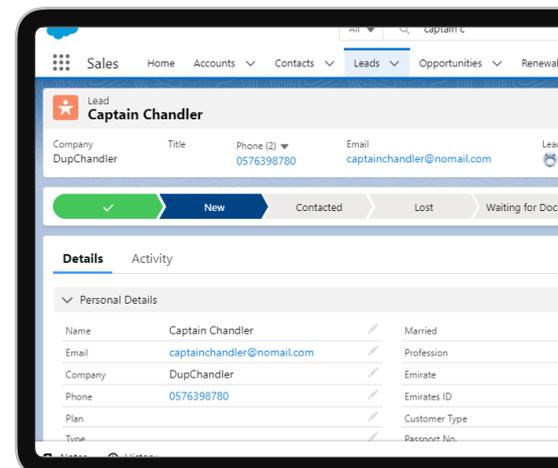
- 🕒 Direct leads to the right people to eliminate duplication and overload
- 🕒 Ensure offerings are mapped correctly between the website and Salesforce
- 🕒 Secure policy-related information and reports in Salesforce
- 🕒 Enable forecasting of future pipelines

Qburst Solution

- ⦿ Set up REST-based integration with website and online portal by using standard Salesforce APIs — exposing custom classes as web services
- ⦿ Set up record types within Salesforce to map products with relevant fields
- ⦿ Customized Salesforce by using Apex triggers, classes, custom settings, metadata, and lead assignment rules to:
 - ⦿ Identify duplicate leads
 - ⦿ Assign leads to agents
- ⦿ Set up integrations between marketing/advertising tools such as Campaign Monitor and Facebook Lead Ads, and Salesforce for seamless data transfer

Project Highlights

- ⦿ Round-robin scheduling for lead processing to avoid overload for sales agents
- ⦿ Lead classification on the basis of accounts, contacts, and opportunities when quote number is generated
- ⦿ Automatic closure of opportunities in Salesforce upon completion of policy premium payment by customers through the online portal
- ⦿ Auto-renewal of policies before expiry date
- ⦿ Multi-information display dashboard displays reports/statuses on the home screen
- ⦿ Customized email client for sales agents to communicate with prospective customers



Technologies Used

- 📍 Salesforce CRM
- 📍 Apex
- 📍 REST API

Business Benefits

- 📍 32% increase in sales productivity
- 📍 24% faster deal closure
- 📍 55% faster marketing campaign deployment
- 📍 Streamlined experience for all agents across the organization
- 📍 Enhanced monitoring of sales performance



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