

# Modernizing Insurance Quoting on Salesforce for a Leading U.S. P&C Broker



# THE SHIFT

## A New Standard for Insurance Quoting

In the U.S. P&C insurance market, speed and accuracy define success. Advisors are expected to quote faster, manage complex policies, and deliver seamless experiences — all while navigating multiple carriers and systems.

For one of the country's largest insurance brokers, the challenge was no longer about technology adoption. It was about reimagining how quoting should work at scale.



## Why Change Was Inevitable

As the organization grew, so did the complexity of its quoting ecosystem:

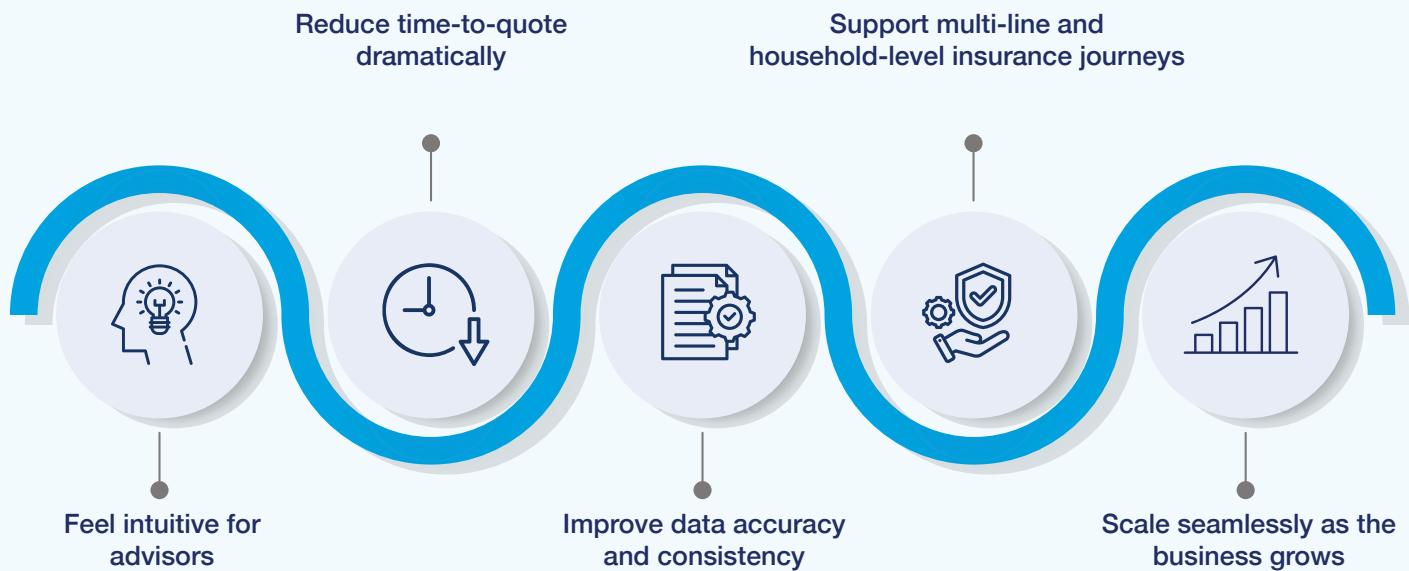
- Multiple products across Auto, Home, and Bundled policies
- Disconnected carrier systems and legacy platforms
- Increasing dependency on manual data entry
- Limited visibility across policies, claims, and commissions
- Advisors spending more time navigating systems than advising clients

What they needed was not another tool, but a **modern, advisor-first quoting experience built for scale.**



## The Vision

To create a Salesforce-powered quoting platform that would:



In short: **Turn quoting into a competitive advantage.**

## Quick Snapshot

**Industry:** Property & Casualty Insurance

**Region:** United States

**Platform:** Salesforce Financial Services Cloud

**Core Focus:** Advisor Experience • Quoting • Data Accuracy • Scale

## Measured Impact:



# THE TRANSFORMATION

## Designing an Advisor-First Quoting Experience

Rather than retrofitting existing workflows, ABSYZ reimagined the experience from the advisor's perspective.

The result was a guided, intuitive quote journey built on Salesforce — one that reduced complexity while increasing speed and confidence.

### What Changed:



Fewer steps to generate quotes



Clear, guided data entry



Consistent experience across products



Reduced dependency on manual checks

### Building the Right Data Foundation

At the core of the solution was a robust insurance data model built in Salesforce Financial Services Cloud.

#### This included:



Customer Property



Insurance Policies



Business Milestones



Person Life Events

#### This structure enabled:



Consistent data capture



Better policy relationships



Cleaner downstream integrations



Accurate household-level views

### From Lead to Quote — Fully Automated

ABSYZ implemented a robust, FCRA-compliant lead-to-quote process that:



Automated validation and qualification



Reduced manual intervention



Improved data consistency



Accelerated quote creation

## Accuracy Powered by Intelligent Data Enrichment

To improve quote quality and underwriting confidence:

- Multiple ITV data sources were integrated
- Property and risk data were auto-enriched
- Manual corrections were significantly reduced

This led to more reliable quotes and fewer downstream revisions.

## A Unified Advisor Workspace

Using OmniStudio, ABSYZ delivered a single, cohesive workspace where advisors could:

- Create and manage policies
- View claims and commissions
- Access household-level insights
- Navigate seamlessly across workflows

Everything an advisor needed — in one place.



## Connected Ecosystem, Not Isolated Systems

The solution integrated seamlessly with:

- Multiple carrier platforms
- Legacy systems
- Internal data sources

This eliminated duplication, improved data flow, and ensured real-time access to critical information.

## The Business Impact



### Faster Quoting

Quotes generated up to 40% faster, improving responsiveness and close rates.



### Higher Advisor Productivity

Less manual work, fewer errors, and more time spent with customers.



### Better Data Quality

Automated validations delivered 40% improvement in accuracy.



### Greater Visibility

Unified view across policies, claims, and commissions.



### Built for Scale

A future-ready Salesforce foundation supporting growth, new products, and new carriers.

## The Result

By modernizing its quoting experience on Salesforce, the organization transformed a traditionally complex process into a streamlined, advisor-first workflow.

The outcome was a **better experience for advisors, better service for customers, and a scalable foundation for growth.**



## Let's Build What's Next

Looking to modernize your insurance operations with Salesforce?  
ABSYZ helps insurance leaders design platforms that scale with confidence.

