



Insurance Agent/Broker Blueprint



financial services cloud
sales cloud
service cloud

Marketing: Lead to Prospect	Prospect to Qualified	Quoting & Submission	Policy Admin	Accounting & Billing Servicing	Servicing	Retain & Grow / Manage Business
Campaign Management	Lead Management & Prioritization	Quoting	Policy Transactions **	Commissions Calculations	Claims Tracking	Customer Retention
Opportunity Management	Producer Goal-Setting	Submissions / Acord Applications	Policy Changes**	Direct Bill Reconciliation	Endorsements	Up-Sell / Cross-Sell
Customer Journey Management	Qualification / Data Capture	Submissions Tracking / Tracking *	Generate Certificates and Auto IDs	Agency Bill Invoicing and Receipts	Activities and Tasks Management	Production Reporting
Social Monitoring & Analytics	Prospect Analytics	Remarket	Document Management**	Financial Reporting	Self-Service Customer Portal	User Specific Productivity Dashboards

* Veruna supports BOTH P&C and Benefits *integrated together in one UX* – **this is unique in the industry**

** Veruna is the **ONLY AMS** that supports carrier downloads directly into Salesforce (a requirement for any P&C agent/broker)

Insurance Agent/Broker Platform Enablers

Customer 360 | Journey Management | Workflows/Automation | Activity Orchestration | Intelligence/Analytics & Reporting | Insights | Alerts/ Notifications | Veruna Download Inbox | Veruna ACORD Form Integration (with storage) | S-Docs and S-Sign

API & Data Sources

DOWNLOADS: IVANS, Progressive, Erie, file load, etc. ACORD Forms