



Overview

Natively built on the Salesforce platform, Guidewire for Salesforce enables seamless integration between Guidewire InsuranceSuite and Salesforce Financial Services Cloud. Key data objects are integrated, and insight-driven data is instantly accessible through view on demand.

Benefits

- **Work effortlessly**
- **Grow predictably**
- **Strengthen loyalty**

Features

- **Elevate representatives with 360° views and analytics-driven guidance to industry-specific insights**
- **Provide effortless access to real-time quoting, policy and claims servicing, and FNOL**
- **Drive agile response with consolidated information from disparate input channels**
- **Grow the business with intelligent pipeline management and embedded quote and bind**
- **Increase retention with proactive alerts to potential attrition risk**
- **Protect your customers' interests with comprehensive views of policy, billing, and claims**

Guidewire for Salesforce

➤ **Enable a unified and holistic customer view with the industry-leading P&C platform and the #1 global CRM solution.**

Deliver Customer-Obsessed and Agile Insurance

The typical insurance company today has several core systems, including a CRM. Complex IT architectures often mean that end users, customer service representatives, and captive agents must hunt for relevant information about policyholders and policies across disparate systems.

They spend their days pivoting back and forth between their insurance core system and their CRM, and it results in inconsistent processes as well as numerous redundancies. They find themselves keying in redundant information about a single policyholder in two or three different systems.

Insurers in this predicament lack a clear, consistent understanding of who their policyholders are, what policies they have, what other business they have with an insurer, which other accounts are related to theirs, and so on. In short, they have inadequate insights into each policyholder or potential customer, so they cannot serve them well or suggest other offers.

“When technology works well, it helps our representatives do what they do best—build enduring relationships with policyholders.”

—Peter Moreau, CIO, Amica

Data Integration

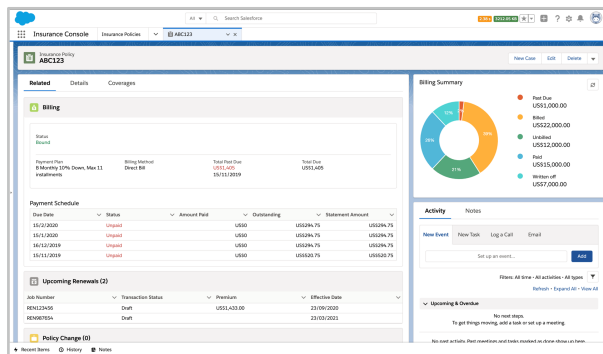
Select a few header-level attributes of key objects integrated bi-directionally to enable cross-system transactions, and the summarized data is transferred to Salesforce Financial Services Cloud to enable Salesforce Platform features.

- **Global search:** Identify callers quickly and easily in Salesforce based on associated policies and claims, as policy and claims header-level data is integrated with Salesforce Financial Services Cloud.
- **Omnichannel transactions:** Start a quote or claim in Guidewire, and it appears in Salesforce in near real time, facilitating an omnichannel customer experience.
- **Seamless workflows:** Leverage activities and notes synchronization in both directions to gain single-pane visibility into cross-system workflows across Salesforce and Guidewire.

InsuranceSuite Views on Demand

Using native Salesforce Lightning Web Components, select views into Guidewire InsuranceSuite to view detailed information.

- **Secure Guidewire PolicyCenter/Guidewire ClaimCenter/Guidewire BillingCenter data retrieval:** Leverage secure data retrieval through purpose-built extensible APIs that follow data-access rules built in InsuranceSuite.
- **Native Salesforce UI components:** View InsuranceSuite data directly in the Salesforce UI, when data is not stored in Salesforce Financial Services Cloud. With data from InsuranceSuite, native Salesforce Lightning Web Components enable key use cases, such as access to past policy transactions, billing summaries, and exposure on claims.
- **Configurable 360° visibility:** Easily mix and match UI components with custom components that fetch data from legacy policy administration or third-party billing and claims systems to complete 360° views.



Customer 360° View

“Our service reps need to master much greater complexity and need to understand their customers’ needs more than ever before.”

**—Thomas Erichsen, Group EVP,
Topdanmark**

Embedding Digital UI

Embedded digital flows help initiate cross-system transactions to enable users to stay in Salesforce to complete user processes.

- **Embeddable digital UI:** Out-of-the-box patterns embed the digital UI for real-time quoting and servicing integrated with InsuranceSuite.
- **Secured access to PolicyCenter/ClaimCenter/BillingCenter transactions:** PolicyCenter, ClaimCenter, and BillingCenter access security applied at the entry point of each transaction based on digital security.
- **Seamless user experience:** Single sign-on provides a seamless user experience.

Today’s insurance customer expects fast and efficient service. You can exceed customer expectations and drive profitable growth with **Guidewire for Salesforce**. Delight customers with personalized service by instantly and effortlessly empowering your captive agents and service representatives with access to the insight-driven policy, claims, and billing information that they need.