

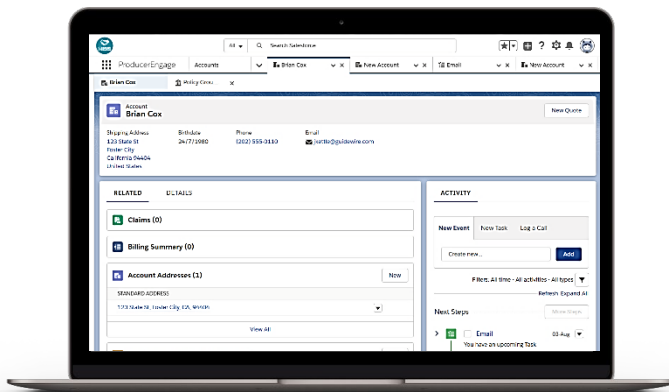


# Guidewire for Salesforce

## ProducerEngage for Salesforce Financial Services Cloud

Empower Captive Agents to Be Excellent in the Moment

### DATA SHEET



#### Improve:

- Captive agents' ability to serve policyholders
- Management of up-sell and cross-sell opportunities
- Communication across channels
- Accessibility of relevant customer information and availability of actionable insights
- Policyholder satisfaction

#### Reduce:

- Time spent manually searching for customer information across multiple systems
- Missed up-sell and cross-sell opportunities
- Total cost of ownership, with an integrated, best-in-class solution and an easy upgrade path

### The Challenge: Serving Policyholders and Selling with Multiple, Disparate Systems

To sell effectively, captive agents need access to the right customer information that drives personalized and efficient engagement. Unfortunately, many of these agents often lack holistic views of policyholders and prospects across different lines of business. To solve the problem, many captive agents find themselves switching constantly from system to system.

### The Solution: Guidewire ProducerEngage for Salesforce Financial Services Cloud

Guidewire ProducerEngage™ for Salesforce Financial Services Cloud is designed specifically for captive agents so that they can serve policyholders and up-sell and cross-sell from one desktop. The application is built natively on Financial Services Cloud to give agents access to data and analytics insights from both Guidewire InsuranceSuite™ and Salesforce. Captive agents can now quote and bind new policies, provide billing and claims details, and track sales leads and opportunities in a single place. The solution provides 360-degree customer views so that agents can be excellent in the moment, deliver informed and empathetic service, and leverage valuable, actionable insights to engage in targeted up-sell and cross-sell discussions—all in real time.

## Key Features

ProducerEngage for Salesforce Financial Services Cloud combines key capabilities of the Guidewire Digital™ platform and the rich functionality of Guidewire InsuranceSuite™ with the leading CRM capabilities of Salesforce. Insurers can now provide their captive agents with a comprehensive view of the book of business with individual customers across P&C and non-P&C lines of business. Using Guidewire’s productized integration solution lets insurers focus on providing a differentiated customer experience without worrying about the challenges of building out and maintaining integrations between the two platforms.

## Capabilities Supported by ProducerEngage for Salesforce Financial Services Cloud

<ul style="list-style-type: none"> <li>• Holistic, 360-degree views of policyholder information, including customer contact information</li> <li>• Expanded summary views of policy, billing, and claims data</li> </ul>	<ul style="list-style-type: none"> <li>• Two-way synchronization between Guidewire PolicyCenter™ and Financial Services Cloud so that changes made in InsuranceSuite are instantly reflected in the Salesforce platform</li> <li>• Integration architecture can be easily expanded so that additional data objects can be synchronized between both platforms</li> </ul>
<ul style="list-style-type: none"> <li>• Synchronization of activities and tasks between InsuranceSuite and Financial Services Cloud</li> </ul>	<ul style="list-style-type: none"> <li>• Embedded Quote and Bind transactions and flows for multiple lines of business: Personal Auto, Homeowners, Commercial Property, Business Owners Policies, and Workers’ Compensation</li> </ul>
<ul style="list-style-type: none"> <li>• Synchronization of opportunities between InsuranceSuite and Financial Services Cloud (i.e., reflected as submissions in PolicyCenter)</li> </ul>	<ul style="list-style-type: none"> <li>• Global Search across both InsuranceSuite and Salesforce, as well as creation of new customers/accounts in InsuranceSuite and Salesforce (i.e., validation that prospect is an existing customer and—if the prospect is a new customer—automatic creation of new account in both PolicyCenter and Salesforce )</li> </ul>
<ul style="list-style-type: none"> <li>• Enhanced data model supports multiple addresses per customer or account</li> <li>• Additional data pre-fill support (e.g., all contact information in Insurance flows), surfacing any integration with external data sources established with InsuranceSuite</li> </ul>	<ul style="list-style-type: none"> <li>• “Smart Link” from Financial Services Cloud to InsuranceSuite, enabling agents to jump from Salesforce to InsuranceSuite with the full context of the session for the specific account, policy, claim, or billing transaction</li> </ul>
<ul style="list-style-type: none"> <li>• Ability to pause and resume data entry for quotes and to work on multiple quotes in parallel</li> </ul>	<ul style="list-style-type: none"> <li>• Tested and optimized applications for different interfaces and form factors (Salesforce Native Web Interface, Salesforce Mobile App for tablet)</li> </ul>

*For a complete overview of ProducerEngage functionality, contact your Guidewire representative.*

## Key Benefits

Guidewire ProducerEngage for Salesforce Financial Services Cloud provides a productized integration between Guidewire InsurancePlatform™ and Financial Services Cloud. This integration architecture enables two-way synchronization of data between both platforms. Guidewire maintains and updates the integrations and completes the Salesforce security review process on a regular basis.

In addition, the solution drives agent productivity by reducing context switching and by making a holistic view of the customer account easily accessible.

The holistic, 360-degree customer view and additional actionable, data-driven insights help agents proactively identify and realize the full potential of up-sell and cross-sell opportunities.

## About Salesforce Financial Services Cloud



Salesforce Financial Services Cloud is the world's #1 CRM, reimagined for insurance. Built on the Salesforce Customer Success Platform, Financial Services Cloud is a system of engagement that delivers value by providing an omni-channel, holistic view of the policyholder or producer. Insurers benefit from a comprehensive 360-degree view of the policyholder, better alignment across all phases of the customer journey, and actionable insights from all of the customer data. Salesforce continues to innovate and provide insurance capabilities on Financial Services Cloud with three release cycles per year.

## About Guidewire Software

Guidewire delivers the industry platform that Property and Casualty (P&C) insurers rely upon to adapt and succeed in a time of accelerating change. We provide the software, services, and partner ecosystem to enable our customers to run, differentiate, and grow their business. We are privileged to serve more than 350 companies in 40 countries. For more information, please visit [www.guidewire.com](http://www.guidewire.com) and follow us on twitter: @Guidewire\_PandC.