

Policygenius Pro Sales Cloud Enhancements

Innovation enables faster and easier partner acquisition, onboarding, and activation.

OVERVIEW

Policygenius is the leading tech-enabled platform for one-stop-shop insurance shopping and fulfillment with a marketplace of top insurers across life, disability, and home and auto insurance. The goal of the company's newest line of service – Policygenius Pro – is to help partners' clients get the insurance coverage they need.

Policygenius engaged HigherEchelon to enhance an existing Salesforce implementation to design and develop a fast and efficient partner acquisition and onboarding process, allowing partners to access Policygenius's best-in-class life insurance sales and fulfillment solution more quickly.

Key Metrics

- Over a fifteen-fold growth in the number of leads generated and nearly three times as many converted leads.
- An 8-fold increase in accounts in onboarding status.
- A 21-fold increase in accounts in ready to sell status.
- A 3x increase in closed won opportunities.
- A 6x increase in producers that are ready to sell.
- Over 13 times as many appointments created, with more than 8 times as many in good order.


HIGHERECHELON™

<https://www.hesfp.com>

CHALLENGES



- The concepts behind Policygenius's platform are cutting-edge, but internal systems didn't fully support the standing up of the new business unit.
- The process of acquiring, onboarding, and activating partners to the Policygenius platform is necessarily high touch, complex, and cannot be sustained without the right technology.
- Policygenius Pro team members tracked appointment requirements, codes, statuses, what documentation had or hadn't been obtained, and more using shared spreadsheets, contracting took place in another system.

SOLUTIONS



In-depth discovery and review of existing processes as part of a collaborative approach to building multiple automations and integrations supporting complex workflows.



**Robust
Discovery**



**Significant
Automation**



**Multiple
Integrations**

1

Salesforce Configuration

Created a data model specific to the insurance industry and a model illustrating revenue potential for partners by updating existing objects and fields, and building new objects, fields, and relationships.

2

Streamlining and Speeding Up Workflows

Built multiple automations to support the partner and agency onboarding process, appointment requirements, carrier codes, and tracking onboarding step completion.

3

Integrations with Custom Systems

Connected Salesforce to a custom external sales engagement platform to enable the team to see all data in one place and more seamlessly connect with partners.

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RESULTS

1

Single Source of Truth

Onboarding and appointment teams can manage partner onboarding from start to finish, including requirements tracking, appointment code management, and tracking progress along the way.

2

Real-Time Analytics

Time stamping features enable Policygenius to monitor onboarding turnaround times and identify sticking points for resolution.

3

Faster Communication

The team can easily identify partner producers who are ready to sell, automatically trigger invitations to the Policygenius Pro platform, and communicate using standardized templates.

4

Better Partner Experience

New automations save time, minimize the potential for errors, and ensure all partners and producers have a consistent, high-quality experience.

5

Better Partner Engagement

Ongoing, proactive partner engagement (based on onboarding status or activity levels) is much easier thanks to configuration and integrations into Policygenius's other critical tracking systems.

6

Fast Case Resolution

Using Service Cloud, partner agencies and producers can submit inquiries and issues that can be tracked through the resolution process in Salesforce, rather than exclusively via email.

Policygenius



Has been one of the best IT vendor experiences I've had in 25+ years of work.

**- Policygenius
Executive Sponsor**

Products Used

- Sales Cloud
- Service Cloud
- Code-based integrations
- AppExchange-based integrations
- Flow
- Campaigns