

# 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 HESFP, LLC 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.

## 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**

### Salesforce Configuration

1

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



### Single Source of Truth

1

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

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*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



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