

Deliver exceptional customer service that fuels sustainable growth

Guidewire for Salesforce

Insurers often operate in complex technology environments with multiple Core systems and a Customer Relationship Management (CRM) platform. For customer service representatives and captive agents, locating policyholder information across these disparate systems is cumbersome. They must constantly toggle between the Core system and the CRM, leading to inconsistent processes and repetitive data entry.

As a result, insurers lack a unified view of the policyholder - their active policies, other business relationships with the insurer, and related accounts. This fragmented customer view limits their ability to deliver high-quality service and identify opportunities for cross-sell and up-sell.

Guidewire for Salesforce Financial Services Cloud is a Salesforce managed package which natively integrates **Guidewire PolicyCenter** with Salesforce to provide a unified 360-degree customer view, enhancing service, improving collaboration, and driving sales.

Benefits	Features
Boost customer service by providing fast, accurate responses	360-degree customer view with on-demand access to critical insurance information
Improve team communication and collaboration	Bi-directional synchronization of notes and activities
Increase sales through effective cross-sell and up-sell	Visual configuration tools to define and extend data mappings
Easy to use with simplified installation, configuration and management	Straightforward installation using Salesforce managed-package and standard cloud APIs without any middleware

Empower Customer Service Representatives (CSRs)

Guidewire for Salesforce is designed to empower Customer Service Representatives (CSRs) by seamlessly integrating disparate data sources into a cohesive, unified platform. The solution is built around several key pillars, each contributing to a more effective and responsive customer service ecosystem:

- **360-Degree Customer View:** Guidewire for Salesforce provides CSRs with a holistic view of customer information. This includes immediate access to critical policy details, a comprehensive

history of claims, and up-to-date billing information, all consolidated within the familiar Salesforce interface. This integrated perspective not only facilitates more efficient issue resolution but also uncovers valuable opportunities for cross-selling and tailored servicing, allowing CSRs to proactively meet customer needs and deepen relationships.

- **View on Demand:** Critical to responsive customer service, the "View on Demand" feature grants CSRs real-time access to essential insurance data through dedicated screens. This capability allows CSRs to quickly retrieve specific information as needed during customer interactions, facilitating prompt and accurate assistance. Whether it's verifying coverage, checking claim status, or reviewing payment history, the information is readily available when and where it's required.
- **Data Synchronization:** To ensure that CSRs are always working with the most current information, Guidewire for Salesforce employs robust, near-real-time data synchronization of critical insurance information. This critical feature keeps data related to accounts, contacts, products, quotes, and opportunities consistently aligned between Guidewire and Salesforce. The result is a single source of truth that eliminates discrepancies, reduces errors, and empowers CSRs with the confidence that the information at their fingertips is always accurate and up-to-date.
- **Enhanced Collaboration:** Effective internal communication is paramount in customer service. Guidewire for Salesforce addresses this by enabling bidirectional synchronization of notes and activities. This ensures seamless collaboration between CSRs and other users of Guidewire's InsuranceSuite, such as underwriters, claims adjusters, and billing specialists. By keeping all relevant stakeholders on the same page, the solution fosters a coordinated approach to customer servicing, leading to faster resolutions and improved customer satisfaction.
- **Simplified Management:** Recognizing the importance of ease of deployment and ongoing maintenance, the solution is published as a Salesforce managed package. This simplifies the entire lifecycle from installation to ongoing management, making it accessible even for organizations with limited IT resources. Furthermore, the package includes intuitive visual data mapping tools within Omnistudio, enabling straightforward configuration and customization to align with specific business processes without requiring extensive coding knowledge.
- **Direct Integration:** To optimize performance and minimize complexity, Guidewire for Salesforce leverages standard InsuranceSuite APIs and App Events for direct integration. This strategic choice bypasses the need for intricate middleware, resulting in a more streamlined and efficient flow of data between systems. The direct connection reduces latency, enhances data integrity, and simplifies the overall architectural footprint.

The solution supports Salesforce Financial Services Cloud with Guidewire PolicyCenter. Support for Salesforce Sales and Service Cloud is planned in a future release.

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.

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

- Peter Moreau, CIO, Amica Mutual Insurance Company

"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