

# INSURANCE AT-A-GLANCE

YOUR CONSULTING  
PARTNER

## WHO WE ARE

Sikich is a Salesforce Consulting and Implementation Partner with over twelve years of Salesforce experience. Our consultants are not only highly trained Salesforce experts, they are also excellent business consultants. As part of our national professional services specializing in accounting, advisory and technology Sikich offers a formula of consulting uniquely crafted to address our clients' business's challenges and opportunities. We help our clients accelerate their digital transformation by understanding "what could be," help them set priorities and take responsibility to deliver the best possible business outcomes.

## WHAT WE DO

We create enterprise value across your entire organization by providing end-to-end solutions focused on improving business performance. Ultimately, the combination of Salesforce expertise and collaboration results in a successful personalized solution to address any business challenge.



BUSINESS PROCESS  
OPTIMIZATION



SALESFORCE  
IMPLEMENTATIONS



INTEGRATION AND  
DEVELOPMENT



MANAGED SERVICES  
AND SUPPORT



ONGOING ROADMAP  
AND SERVICE  
REVIEWS

## WHY SIKICH?

- With a focus on speed to value, Sikich leverages our cross-practice Insurance expertise with our Salesforce experience to deliver a quick ROI on your Salesforce Investment.
- With 35 years in business and over 1,300 team members, we've helped 15,000+ clients achieve success.
- Day in and out, we help leading insurers leverage innovations in digital, data, and cloud technologies to drive profitable growth, distinctive customer engagement, agent productivity, and innovative new business models.
- At Sikich, we have extensive experience in customizing Salesforce for Insurance Carriers to manage the on-boarding of producers and integrate with underwriting platforms to bring in performance data that can be measured and reported on using the powerhouse capabilities of Salesforce analytics.
- When you work with Sikich you not only get a seasoned Salesforce implementer, you get the strategic edge with access to end to end business and technology consulting experts.

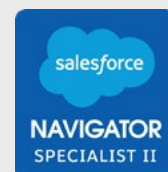
- Over 150 Insurance Clients
- Deep industry knowledge across agencies, MGAs and carriers
- Technical knowledge within Salesforce, Insurity and Veruna AMS
- Significant experience in deploying Financial Service Cloud
- Over 1,000 Salesforce Implementations



Financial Services



Sales Cloud



Insurance



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## KEY PRODUCT & INDUSTRY SUCCESS

### JM WILSON (MANAGING GENERAL AGENCY) Sales Cloud, Platform, Pardot

**Solution:** developed enterprise wide solution to manage Agency Recruitment, Submissions & Policies, Underwriting, Carriers and Commissions.

**Outcome:** created operational efficiencies, increased collaboration, streamlined processes, and centralized information to drive decision making.

*"Our biggest goal for the project was to migrate over our legacy system into Salesforce. We wanted to eliminate errors and increase our speed and our efficiency, and actually be able to look at and analyze our business data, which we could never do before. Sikich was great at communicating with us. They were there, I mean, every step of the way. They always wanted to make sure that we were on the same page, that everyone knew what was going on, that we knew what the next steps going forward and what had to be done. They also were able to come up with ideas and different solutions for us. As cliché as it might sound, I would give Sikich five stars all around on everything. I feel comfortable with my Salesforce organization in Sikich's hands, which is a big deal. It's just good to be able to trust a partner that you're working with, especially when it's important business data like this."*

Elizabeth Sundburg, Salesforce Administrator, JM Wilson

### KEYSTONE INSURERS GROUP (AGENCY & BROKERAGE) Sales Cloud, Experience Cloud

**Solution:** enhanced the Keystone existing Experience Cloud to drive efficiencies and improve Agency user experience for accessing and sharing knowledge in the Community.

**Outcome:** gained operational efficiencies by streamlining processes with their partner.

*"Sikich's expertise in the insurance industry was evident and critical in making this project successful. Sikich came highly recommended to use by a business partner as we were looking for a firm that is equally skilled at Salesforce.com, Salesforce Experience Cloud, and insurance expertise. They helped enhance our existing Salesforce environment and built our Salesforce Partner Community to drive adoption with our agencies. Everyone at Sikich has been very responsive, personable and easy to work with. I would highly recommend Sikich to any insurance carrier or agency that is looking for a long-term Salesforce partner."*

Bob Scullin, CTO, Keystone Insurers Group

SALESFORCE  
CERTIFIED

ADMINISTRATOR

ADVANCED  
ADMINISTRATOR

APP BUILDER

CPQ SPECIALIST

EXPERIENCE CLOUD  
CONSULTANT

FIELD SERVICE  
CONSULTANT

INDUSTRIES CPQ  
DEVELOPER

MARKETING CLOUD  
EMAIL SPECIALIST

PARDOT SPECIALIST

PLATFORM APP BUILDER

PLATFORM  
DEVELOPER I

PLATFORM  
DEVELOPER II

SALES CLOUD  
CONSULTANT

SERVICE CLOUD  
CONSULTANT

 **SIKICH**®