

Customer Story: NFP

Industry

Benefits, Wealth & Annuities

Solutions

Salesforce Implementation
Managed Services

Staff

& 6,000+
Employees

HQ Office

New York, NY

NFP is a leading insurance broker and consultant providing specialized property and casualty, benefits, wealth management, and retirement planning.



Salesforce Challenges

- ⦿ Sales team did not have a lead management system.
- ⦿ Sales team did not have a lead Opportunity system.
- ⦿ Existing sales systems did not integrate with customer master data systems.
- ⦿ No Computer Telephony Integration.
- ⦿ No file repository.

They found themselves scrambling to utilize multiple platforms and were often faced with unreliable and inconsistent data. As a result, development projects struggled to stay on schedule and overall organization and company functionality faltered as well.

Access Global Group Solutions

- ⦿ Deployed Salesforce and Avaya CTI across all the sales and advisor teams in North America.
- ⦿ Implemented new sales process flows, 'how to accomplish' recommendations and 'tools needed' for comprehensive sales cycle support and real-time knowledge sharing.
- ⦿ Integrated and streamlined order history via integration Oracle via Informatica Cloud integration.
- ⦿ Developed custom Force.com app, enabling field reps to log activities via iPads and mobile.
- ⦿ Implemented Chatter to enable real-time collaboration and knowledge-sharing across teams.
- ⦿ Implemented document generation & storage solution.
- ⦿ Implemented electronic signature solutions.
- ⦿ Our Managed services program helped customer support users after each phase of implementation.

Salesforce Results

- ⦿ Maximized investments in existing back-office systems with integration into Salesforce.
- ⦿ Increased sales productivity and dramatically improved sales effectiveness across teams – each rep now save 2 hours per day.
- ⦿ On-demand access to education information management on one platform.
- ⦿ Significantly improved data accuracy via near real-time mobile updates has enhanced revenue forecasting and sales intelligence.
- ⦿ Greater visibility into key business metrics and performance trends across sites, enabling more targeted, data-driven improvement strategies.
- ⦿ More motivated, results-driven sales team.