

Customer Story: Farmers Insurance

Industry
Insurance

Solutions
Integration Services

Staff
21,000+ Employees

HQ Office
Chicago, Illinois

Farmers Insurance Group is an American insurer group of automobiles, homes and small businesses and also provides other insurance and financial services products. Farmers Insurance has more than 48,000 exclusive and independent agents and approximately 21,000 employees.



Salesforce Challenges

- ⦿ Customer data was siloed in multiple systems.
- ⦿ Reports were confined to the individual systems and took a great amount of time to consolidate.
- ⦿ Customer data was not integrated with sales.
- ⦿ There was no way to access the current services received by customers.
- ⦿ All systems were manual.
- ⦿ Lack of team communication.
- ⦿ Sales could not run campaigns on leads.
- ⦿ Sales process was long and cumbersome.
- ⦿ The existing system was limited by size.

Access Global Group Solutions

- ⦿ Implemented Salesforce Sales Cloud.
- ⦿ External systems were integrated with Salesforce Sales Cloud.
- ⦿ Set up Chatter & Files for internal communication and file storage.
- ⦿ Customized Salesforce Sales Cloud.
- ⦿ Custom pages.
- ⦿ System configuration to optimize sales team efficiency.
- ⦿ Implemented campaigns for sales team.
- ⦿ Created a new sales process with automated workflows and approval processes.
- ⦿ Campaigns have ended use of email blasts.

Salesforce Results

- ⦿ Sales-related information is now accessible to sales & executive teams in one location.
- ⦿ Sales process is now driven by the Salesforce system.
- ⦿ Reports are now available real-time.
- ⦿ Chatter used company-wide for internal collaboration & sharing files.
- ⦿ Sales team can track emails sent from campaigns.
- ⦿ Customer data can now be used by the sales team to access services that were sold in the past helping to upsell related products.
- ⦿ The new sales process and pipeline give the executive team a new understanding of strengths and needs of the sales team.