

INSURANCE AT-A-GLANCE

YOUR CONSULTING
PARTNER

WHO WE ARE

Sikich is a Salesforce Consulting and Implementation Partner headquartered in Naperville, IL with offices throughout the United States and India. Our consultants are not only highly trained Salesforce experts, they are also excellent business consultants. As part of our comprehensive 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?

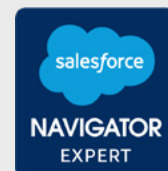
- With a focus on speed to value, Sikich leverages our cross-practice Insurance expertise with our Salesforce experience to deliver a quick ROI on your Salesforce Investment.
- With over 40 years in business and more than 1,300 team members, we've helped 15,000+ clients achieve success.
- Day in and 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. This allows our clients 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.

DON'T JUST TAKE OUR WORD FOR IT.

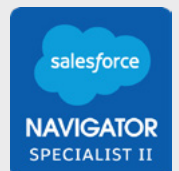
"Sikich's expertise in the insurance industry was evident and critical in making our project successful. Sikich came highly recommended to use by a business partner as we were looking for a firm that is equally skilled at Salesforce.com, Salesforce Communities, and insurance expertise. Sikich helped enhance our existing Salesforce environment and built our Salesforce Partner Community to drive adoption with our agencies. Everyone 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 G

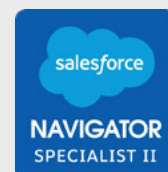
- Deep industry knowledge across agencies, MGAs and carriers
- Technical expertise within Salesforce, Insurity and Veruna AMS
- Significant experience deploying Financial Services Cloud
- Over 1,000 Salesforce Implementations



Financial Services



Sales Cloud



Insurance



SIKICH®

INSURANCE AT-A-GLANCE

KEY PRODUCT & INDUSTRY SUCCESS

GREAT AMERICAN INSURANCE COMPANY (CARRIER)

Sales Cloud, Force.com, Integration

Solution: delivered a multi business Sales Cloud solution to track the effort to appoint Agencies and to track all activity related to Appointed Agency stewardship. Created a Force.com solution to house Agency performance data and performance against goals, all populated via integration. Developed analytics and visualizations to provide summarized and actionable information as well.

Outcome: single view of all Agencies, Agency hierarchy, and Agency performance across multiple business units with improved team collaboration in working with Agencies across multiple business units.

JM WILSON (MANAGING GENERAL AGENCY)

Sales Cloud, Force.com, 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.

KEYSTONE INSURERS GROUP (AGENCY & BROKERAGE)

Sales Cloud, Communities

Solution: enhanced the Keystone existing Community 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.

THE ASHLEY GROUP (GROUP BENEFITS)

Sales Cloud, Force.com

Solution: analyzed current Goldmine setup and configured a custom app to more effectively manage their sales pipeline and client, carrier and broker relationships.

Outcome: ensure efficient and scalable platform where sales, service, account management and marketing teams collaborate effectively by focusing more on relationships rather than manual, administrative tasks.

ASSUREX GLOBAL (AGENCY & BROKERAGE)

Sales Cloud, Integration

Solution: developed a robust integration with their Community website to track and measure partner interactions while promoting targeted efforts for national and international markets.

Outcome: a tailored solution to more effectively collaborate with their partners, by geography, to successfully gain penetration and opportunity pursuits with strategic, large scale clients.

SALESFORCE
CERTIFIED

ADMINISTRATOR

ADVANCED
ADMINISTRATOR

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®