

Transforming Insurance Sales and Service with Financial Services Cloud & MuleSoft Integration



financial services cloud



MuleSoft®



docuSign

Overview

Discover how Synexc helped a leading insurance and annuity provider overhaul its fragmented sales and policy processes with Salesforce's suite of products.

Why This Matters for Other Businesses

Most insurance providers with legacy infrastructure face operational challenges with sales not getting access to policy data, underwriters working in silos, and outdated processes.

How Synexc Helped

Synexc built a secure, scalable platform compliant with HIPAA standards for the client to serve a growing customer base efficiently.

Key Improvements



decrease in manual data entry and quoting tasks



faster turnaround time for policy issuance



of applications processed straight-through, without manual underwriter intervention



increase in agent productivity

About the Client

With coverage exceeding \$1 billion and in business for over 15 years, our client is a leading insurance and annuity provider based out of the US, serving in 300 branches across the nation.

The company offers comprehensive insurance products aimed at protecting families and individuals across the country.

Challenges Faced by the Client

Challenge 1

Manual quoting and onboarding process

Customers relied heavily on agents to gather information and calculate insurance quotes, resulting in time-consuming and error-prone workflows.

Challenge 2

System fragmentation and manual underwriting

Various third-party systems, such as Milliman and MIB, had to be accessed separately, complicating data flows and slowing down decision-making.

Challenge 3

Limited scalability and missing role-based access controls

Faced issues while onboarding thousands of customers and internal users, such as agents and underwriters, without compromising on privacy, compliance, or focus.



Solutions Offered



Financial Services Cloud Implementation for Insurance

We configured Salesforce Financial Services Cloud to align insurance data models such as policies, Participants, Accounts, Households. Also built an agent workspace and used Action Plans for onboarding & follow-ups.



Utilization of OmniStudio Powered Guided Quoting & Applications

We further Developed OmniScripts for quoting & applications with validations. We used DataRaptors for third-party quotes & data prefills and FlexCards for live payment, maturity & rider info.



MuleSoft Integration with Core Policy & Rating Systems

Leveraged the Mulesoft platform for real-time integration of legacy policy/rating systems for quotes, underwriting updates, and policy issuance.



DocuSign Integration to Embed Esignatures

Lastly, Successfully Integrated DocuSign within the OmniScript application for signature tracking and auto-attachment of signed forms, ensuring full audit and consent compliance.



Results



Reduced
Manual
Work and
Delays



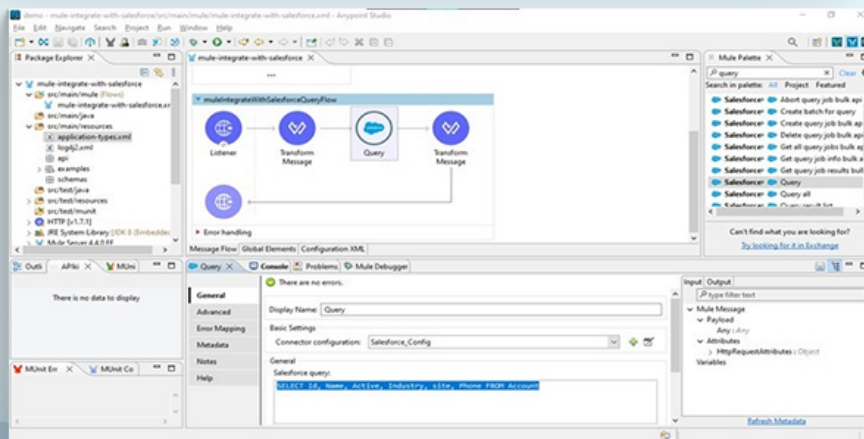
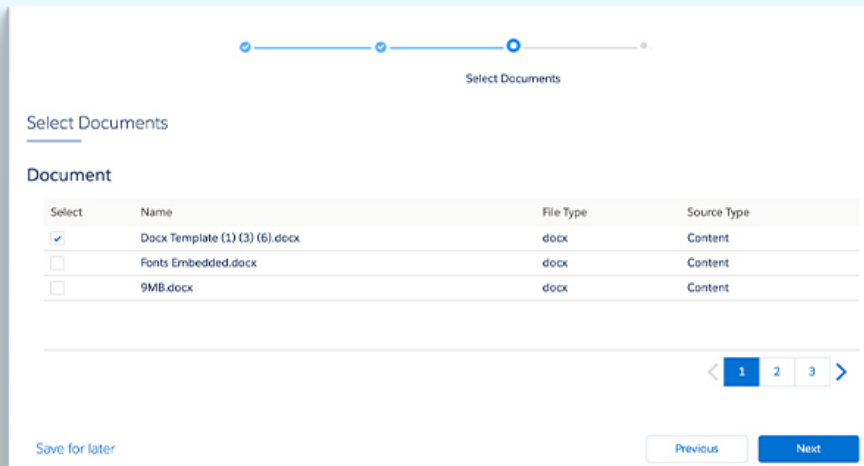
Increased
Policy
Conversions



Seamless
Customer
Support
Experience



Stronger
Cross-
Functional
Alignment



Client testimonial

"We finally have a system that works the way we do. From the quote to the policy, everything is faster, more transparent, and easier to manage."

Alex Jamson

Chief Technical Officer

About Synexc

Synexc is a new-age Salesforce consulting company specializing in CRM implementation, custom development, system integration, and AI-powered solutions. With clients across the US, Europe, and APAC, we are fast emerging as a global hub for delivering scalable, secure, and business-aligned Salesforce solutions tailored to industry-specific needs.

**Reach out to us for a
Free Consultation Now!**

