

TECHNOLOGY SERVICES

SALESFORCE HEADSTART FOR INSURANCE INTERMEDIARIES

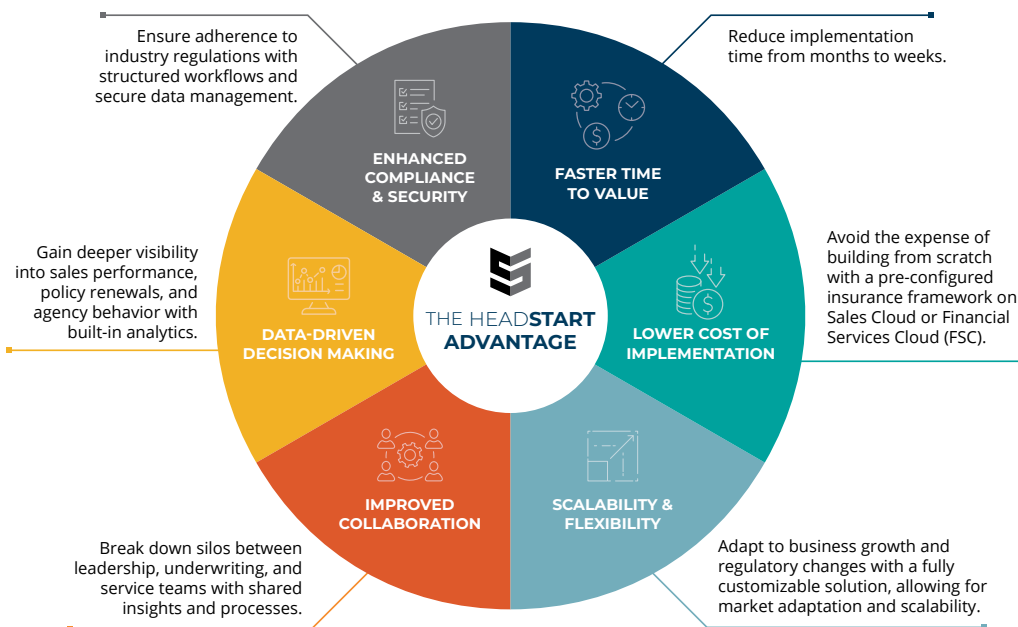
ACCELERATING SALESFORCE IMPLEMENTATION FOR MGAS AND WHOLESALERS

Sikich's Salesforce HEADSTART for Insurance Intermediaries is an expertly designed solution that accelerates the customization and implementation of Salesforce specifically for MGAs and Wholesalers.

By streamlining the setup process, our team eliminates the need for basic, manual configuration, enabling your organization to get up and running swiftly. HEADSTART for Insurance not only saves time but also enhances efficiency in managing Agencies and Opportunities. With its 100% customizability, this starter solution can easily be adapted to fit your unique business needs, ensuring a smooth and effective workflow from the outset.

THE HEADSTART ADVANTAGE: KEY BENEFITS

HEADSTART gives insurance intermediaries a faster, smarter way to get up and running on Salesforce. With a pre-built framework tailored for Sales Cloud or Financial Services Cloud, it delivers immediate value while remaining flexible enough to grow with your business.



KEY FEATURES



PREBUILT REPORTS & DASHBOARDS

Get instant visibility into critical agency and production metrics with out-of-the-box analytics.



INSURANCE-SPECIFIC DATA CAPTURE

Track and manage Appointed Agencies, Submissions, and Opportunities with industry-focused data fields.



CUSTOMIZABLE RENEWAL FLOW

Simplify policy renewals with tailored workflows that fit your business processes.



SUBMISSION TRACKING

Stay organized by monitoring submissions throughout the underwriting lifecycle.



COMMISSION RULE TRACKING

Track and apply commission rules to policies to ensure accurate payouts from carriers and to agencies.



AGENCY APPOINTMENT MANAGEMENT

Capture prospective appointments and manage onboarding processes.

BEYOND IMPLEMENTATION – EXPERT GUIDANCE FROM SIKICH

With Sikich's industry expertise, you can scale beyond the basics and build a comprehensive, future-ready Salesforce environment.

- ✓ **WEBSITES & AGENCY PORTALS**
Enhance agency engagement and efficiency with self-service portals.
- ✓ **THIRD-PARTY INTEGRATIONS**
Connect seamlessly with external data providers, carriers, partners, and Policy Administration Systems.
- ✓ **RATING & QUOTE SERVICES**
Improve efficiency with integrated quoting tools.
- ✓ **SALES ENGAGEMENT**
Enhance company growth with integrated sales insights and discovery tools.
- ✓ **DOCUMENT GENERATION & E-SIGNATURE**
Reduce paperwork and accelerate policy binding.
- ✓ **ACCOUNTING**
Connect Salesforce with accounting systems for financial transparency.
- ✓ **DIGITAL MARKETING SERVICES & CAMPAIGN MANAGEMENT**
Drive engagement and boost acquisition with targeted campaigns and automation.
- ✓ **FULL AMS IMPLEMENTATION**
Ensure a unified system for policy, billing, and claims management.
- ✓ **SERVICE CENTERS**
Improve agent support with streamlined service workflows.

GET STARTED TODAY

Modernize your Salesforce experience with HEADSTART for Insurance and unlock greater efficiency, accuracy, and scalability. [Contact Sikich](#) today to learn how we can help you optimize your insurance operations.

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