

Reimagining Insurance Engagement with Salesforce

An Insurance Industry Point of View by Icreon

The Insurance Engagement Challenge

Across Property & Casualty, Life, and Annuities, insurers continue to invest heavily in digital platforms, yet many struggle to realize meaningful business outcomes from CRM initiatives. Common challenges include:

- Fragmented agent and advisor experiences across multiple systems
- Limited visibility into customers, households, and policy relationships
- Disconnected service and claims interactions that frustrate policyholders
- Reactive, manual renewal and retention processes

The result is low Salesforce adoption, inconsistent customer experiences, and limited return on technology investments.

Why Salesforce Financial Services Cloud

Salesforce Financial Services Cloud (FSC) provides an industry-specific foundation designed for insurance:

- Native modeling of households, relationships, policies, and coverages
- A unified view of the policyholder across sales, service, and claims interactions
- Lifecycle awareness from onboarding through renewal and servicing
- A scalable platform for automation, analytics, and future AI enablement

FSC delivers value when implemented with a clear focus on outcomes, adoption, and speed to value.

The Industry Reality

Insurance transformation rarely fails because of core systems – it fails because engagement is disconnected from them.

- Policy administration, billing, and claims platforms are mission-critical and here to stay
- Salesforce should not attempt to replace these systems
- Salesforce must operate as the system of engagement, orchestrating experiences across the insurance lifecycle

Insurers that succeed focus on improving how people interact with customers and data – not on duplicating core processing.