CLIENT SUCCESS STORY

National Insurance Brokerage

Deprecating a Proprietary Legacy System and Engineering a Unified Salesforce Ecosystem with Custom Commission Automation for a National Life Insurance Brokerage

12+	50%	50%	3
Third-Party Systems Integrated	Faster Monthly Financial Close	Reduction in Admin Tasks	Call Centers Unified

THE CHALLENGE

The client is a national online and call-center-based life insurance brokerage. With three high-volume regional call centers, the organization's licensed agents use a patented sales technology platform to connect thousands of consumers with top-rated insurance carriers.

The firm was entirely dependent on a proprietary homegrown CRM and policy tracking platform that had become a critical bottleneck. Agents were forced into fragmented "swivel chair" workflows across disconnected systems for marketing automation, telephony, quoting, medical exam ordering, and financial reconciliation. Commission calculations—spanning carrier-specific rates, multi-tiered agent hierarchies, production bonuses, and 18-month chargeback modeling—were executed manually via Excel, consuming 10-day monthly close cycles. Leadership had no closed-loop attribution between marketing spend and placed policies, and carried severe compliance risk from fragmented communication logging.

THE VANTAGE POINT SOLUTION

Vantage Point architected and delivered a phased, enterprise-scale Salesforce transformation to completely deprecate the legacy platform and establish Salesforce as the firm's singular, authoritative engagement layer. Working closely with the client's Chief Information Officer, we delivered across three major deployment phases using a disciplined agile methodology with three-week sprint cycles:

Foundational CRM & Omnichannel Integration Deployed customized Sales Cloud with tailored Opportunity Sales Processes, strict validation rules, and a Private Sharing Model with role-based Permission Sets. Executed complex ETL data migration from the legacy platform using Alteryx. Integrated 12+ third-party applications including Genesys Cloud CTI for native click-to-dial telephony, Marketo for bidirectional marketing automation sync, Okta SSO for enterprise identity management, ACORD-compliant insurance data feeds, iGo electronic application processing, and medical exam ordering systems.

Advanced Financial Record Management Engineered custom Financial Account, Transaction, and Portfolio objects with Master-Detail roll-up summaries for real-time balance aggregation. Built automated transaction categorization via record-triggered Flows referencing Custom Metadata for admin-managed keyword rules. Deployed a custom Lightning Web Component rendering an interactive Portfolio Health dashboard on client records. Established secure nightly data ingestion via OAuth 2.0 Named Credentials with Scheduled Apex, plus Field History Tracking and a custom Audit Log for regulatory compliance.

Custom Commission Management System Engineered a fully automated commission engine calculating carrier-specific rates across every product combination with multi-tiered escalations, performance multipliers, and agent-level bonuses. Built hierarchical downline tracking for complex organizational structures, including the firm's independent agent organization. Implemented 18-month chargeback analysis modeling policyholder persistency and individual agent exposure. Integrated bidirectionally with the policy administration platform for real-time status sync, and downstream with Ultimate Software HCM for automated payroll disbursement. Delivered comprehensive AR aging reports by carrier and application status.

RIGOROUS DEPLOYMENT METHODOLOGY

Delivered across 13 agile sprints with parallel UAT for the commission system—running full months of live financial data through the new engine alongside legacy calculations to verify mathematical parity. Completed comprehensive Confluence documentation and a structured technical handoff to the client's internal technology team, ensuring long-term platform autonomy.

WORKFLOW AUTOMATION

METRIC	BEFORE	AFTER VP DEPLOYMENT
System Architecture	Proprietary legacy CRM + silos	**Unified Salesforce with 12+ integrations**
Agent Workflow	Swivel-chair across 5+ systems	**Single-pane omnichannel workspace**
Commission Processing	Manual Excel; 10-day close cycle	**Automated engine; 5-day close cycle**
Admin Tasks	Manual entry, logging, routing	**50% reduction via automation**
Financial Visibility	No real-time AR or attribution	**Live AR aging, carrier tracking, KPIs**

TECHNOLOGY STACK

- Salesforce Sales Cloud (Enterprise)
- Genesys Cloud CTI
- Marketo Marketing Automation
- Okta SSO (SAML/SWA)
- Custom Commission Engine (Apex)
- ACORD Insurance Data Feeds
- Alteryx (ETL & Data Migration)
- Custom LWC (Portfolio Health)
- Policy Administration API
- Atlassian Confluence & Jira

CLIENT TESTIMONY

"As I look through both the functionality and user experience of the product we have developed, I can honestly say that I am proud of this application."

— Cheif Information Officer

WHY VANTAGE POINT

Vantage Point is a Salesforce Consulting Partner focused exclusively on financial services. Our 100% senior-level, US-based delivery team brings 150+ years of combined industry experience across wealth management, banking, insurance, fintech, and mortgage lending. With 400+ engagements, 150+ clients, a 95% retention rate, and a 4.71/5.0 satisfaction score, we deliver measurable results—not just implementations.

Ready to modernize your insurance technology?

sales@vantagepoint.io | 469-499-3400 | vantagepoint.io