

Success Story

From Legacy to Modern Lead Management System: Achieving Sales Excellence for a Multi-Line Insurer

Objective

As an independent multi-line insurance provider, our client offered personal, automobile, homeowners, renters, and business insurance across multiple states. However, their large-scale operations were hindered by legacy systems, creating inefficiencies in lead management and distribution. To modernize their technology landscape, they partnered with Exavalu for expert digital advisory and the establishment of a Salesforce Center of Excellence (CoE).

Services Offered



- Advisory

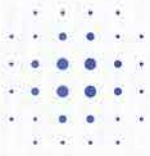


- Salesforce CoE Set-Up

Challenges

The client struggled with managing multiple lead sources due to the absence of a unified platform, leading to inefficiencies in tracking and distribution. They sought an automated process to streamline lead routing to agencies, ensuring faster response times and improved conversions.

Additionally, inefficiencies in lead distribution management created bottlenecks, impacting overall sales performance. With their existing implementation strategy lacking clear direction and governance, they needed a trusted partner to provide strategic guidance and a structured approach for optimization.



How Exavalu Made an Impact

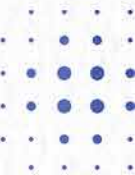
Our Methodology and Approach

To address the client’s challenges, Exavalu established a **Salesforce Center of Excellence (CoE)** and provided governance and best practices for Salesforce implementation. Our team guided them in implementing **Marketing Cloud and Experience Cloud**, seamlessly integrated with **Financial Services Cloud**, to enhance customer engagement and lead management.

We conducted a comprehensive **architecture review**, ensuring the platform's scalability and robustness to support multiple integration points. To drive continuous innovation, we set up a **dedicated POD team**, delivering ongoing enhancements and application support. Additionally, we partnered with **business and IT leadership** to define a clear CRM roadmap, aligning technology investments with long-term business objectives.

Business Impact

- Reduced duplicate leads from multiple sources, improving data integrity and efficiency in lead management.
- Supported multiple integrations and enabled seamless data flow across systems.
- Faster time-to-market for new product offerings, driving business growth.
- Automated lead routing, ensuring efficient and fair lead distribution among agencies.
- Improved lead quality and faster conversion rates, leading to higher engagement and satisfaction across the sales network.
- Rapid enhancements and innovation to stay ahead of market demands.



Metrics

30000+ Leads
Process per Month

25% Reduction in
Lead Processing Time

5+ Integration
Points Implemented

10+ Enhancements
Deployed Monthly