

Symbility Solutions

Industry

- Technology
- Insurance

Project Outcomes

- Improved visibility
- Improved data quality
- More efficient sales users

Solution Features

- Sales Cloud
- Service Cloud
- HubSpot integration
- Reports and dashboards



About AppCentrica

We've built our Salesforce practice one customer at a time based on quality and strong relationships. We deliver proven solutions for:

- Sales Cloud + CPQ
- Service Cloud + FSL
- Einstein Analytics
- Community Cloud
- MuleSoft
- Pardot
- B2B Commerce
- Heroku & Custom Lightning Development

About Symbility Solutions

Symbility was a publicly traded technology company based in Toronto, Canada. The company had been in business for over 14 years and operated across three divisions: Property, Health and Intersect. In 2018, Symbility was acquired by CoreLogic but its primary business functions remain the same. The Property and Health divisions focus on modernizing insurance claim solutions for insurance carriers and brokers. Intersect is focused on empowering a variety of businesses with smarter mobile and IoT product development strategies.

Challenge

Symbility management were focused on growing the company by more than 25% per annum and had purchased both Sales and Service Cloud to bolster sales and operational efficiency. However, several challenges early in the implementation impeded adoption.

First, insufficient training lead to a series of inconsistencies between the Property/Health divisions and Intersect. No standardized sales process existed and users across the organization had different viewpoints on how to best operate the system.

Second, data governance practices were not well established and the system had quickly become inundated with incorrect and out-of-date information.

Finally, Symbility's marketing automation platform, HubSpot, remained siloed and sales users had little visibility into prospects' engagement with marketing content.

Solution

AppCentrica worked with Symbility to roll out a series of changes to improve their usage of Salesforce and derive greater value from their investment. First, users from different departments were retrained and a consolidated, optimal sales practice was established between the Health, Property, and Intersect divisions.

Next, existing records were cleaned and recycled where appropriate, and new page layouts and validation rules were established to ensure a better cadence of data integrity moving forward.

Finally, an integration with HubSpot was configured to ensure marketing data was available within Salesforce, and new reports and dashboards were designed for management.

Outcomes

The changes made by AppCentrica have further streamlined Symbility's sales process. Users across varying departments are now aligned in what is required to maintain a highly efficient CRM. Data quality has improved and subsequent user adoption has increased as individuals gain more trust in their database. Management is the net benefactor of all of these changes as they now have easy access to more accurate reporting and better visibility into the sales pipeline as a whole.



"Symbility is a publicly traded technology company that provides solutions to the insurance industry. We had already purchased and implemented Salesforce but faced common challenges to adoption such as inconsistencies in system use and a lack of process automation within the system. As the head of our PMO I worked with AppCentrica to support a more structured approach to configuring Salesforce, training users and providing best practices in adoption. Since going live we've seen a material improvement in adoption for our Property group. The optimization experience with AppCentrica was very positive."

Justin Bogers

Manager, PMO,
Symbility Solutions