APPCENTRICA CUSTOMER SUCCESS STORY

Tompkins Insurance Services

Industry

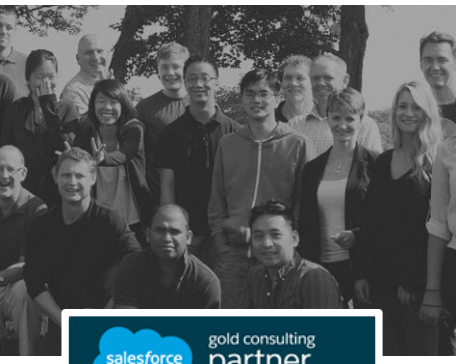
- Insurance

Project Outcomes

- Data migration and consolidation
- 360 view of the customer
- Reduced reliance on manual data entry

Solution Features

- Sales Cloud
- DLRS (declarative lookup rollup summaries)
- 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 Tompkins Insurance Services

Founded in 1990 and based in Toronto's financial district, Tompkins Insurance Services Ltd. specializes in the use of life insurance for estate planning purposes for high net worth families and their advisors, business owners, executives and professionals.

Challenge

Tompkins Insurance was leveraging *Act! CRM* but found it lacked versatility as it could not be customized to sufficiently represent their business model and the complex relationships that exist between their various clients. In addition, Microsoft Word was being used to track insurance applications and Excel to track coverage details. These issues and others all contributed to a general lack of visibility that kept management and sales feeling disconnected.

Solution

As part of an initiative to create a more representative data model AppCentrica was engaged to optimally configure Sales Cloud and support a data migration from *Act!*

By leveraging DLRS, a tool which extends the existing functionality of lookup and rollup summary fields, AppCentrica created multi-dimensional relationships between objects. In doing this, AppCentrica was able to accurately model the complex relationships that surround Tompkins' clients.

In addition, AppCentrica built an application tracking process to outline which applications are in progress, which stage they are at and their unique requirements.

Finally, by utilizing flows information is captured at various stages of the underwriting process to create policies and their associated coverage details automatically – thereby eliminating the need for redundant data entry and record creation.

Outcomes

Since configuring Sales Cloud and moving away from *Act!* Tompkins Insurance has gained much needed visibility. They now have a singular, consolidated system of record which accurately represents their business and sales processes.

The application tracking process has empowered Tompkins with the ability to easily understand which applications are being processed. As well, they can better understand what factors are delaying the underwriting process and can more easily take action to rectify interruptions without having to unnecessarily involve their clients.

Overall, Sales Cloud has greatly improved Tompkins' internal efficiency.

★★★★★

"After struggling with a different Salesforce partner, we engaged AppCentrica to help us safely and securely transition our customer systems from Act! to Salesforce. Since our company specializes in life insurance and estate planning, security and data management were key for us. We can now track and manage customers and business development in Salesforce. We are also able to manage the complex web of relationships that surround our customers, including business entities, influencers and family members. AppCentrica also developed a comprehensive solution to help us master the often-complex insurance application and underwriting process. They have been a highly responsive and trustworthy partner. We continue to work with AppCentrica to develop Salesforce solutions in other specialized aspects of our business."

Marcel Tremblay
Vice President,
Tompkins Insurance