



**CONNECTING THE DOTS:
UNIFIED AGENCY MANAGEMENT
ON SALESFORCE FINANCIAL
SERVICES CLOUDS**

DATAMATICS

About the Client:

A leading property and casualty insurance provider with a strong legacy and a vast network of agencies and agents, the Client is well known for excellence in underwriting, policy management, and claims handling. However, as their operations expanded, aging systems began to hinder performance and agility.

The Challenges: Critical Gaps in Agency and Agent Management

The client sought to modernize and unify their agency management processes. Their legacy systems—especially the producer’s central platform—were outdated, leading to inefficiencies in agency onboarding, data visibility, and day-to-day agent relationship management. They needed a flexible and scalable platform that could:

- Streamline agency appointments and transitions
- Integrate external web services and siloed data
- Improve agent engagement and transparency
- Support fast, intelligent decision-making

The SOLUTION: Scalable, Integrated Solution for Agency Ecosystem Modernization

Datamatics implemented a custom Salesforce Financial Services Cloud (FSC) solution tailored to the client’s complex agency ecosystem.

Key components of the solution included:

- Integration with legacy producer central to create a unified, modern infrastructure
- Custom Salesforce workflows and objects to support end-to-end agency lifecycle management
- API integration with external web services for real-time data synchronization
- Data consolidation to eliminate silos and enhance transparency
- Personalized dashboards and analytics for real-time insights and reporting

The solution was built for scalability, agility, and long-term maintainability—transforming how agency relationships are managed.

The Impact

Automated Workload

Reduced repetitive tasks through automation

Unified Platform

Centralized agency data and activities

Better Agent Experience

Faster onboarding and relationship management

Smarter Decisions

Real-time insights for quick strategy

Operational Agility

Streamlined workflows for faster responses

Scalable Infrastructure

Built for future growth and flexibility

ABOUT **DATAMATICS**

Datamatics enables enterprises to go Deep in Digital to boost their productivity, customer experience, and competitive advantage. Datamatics' portfolio spans across three pillars of Digital Technologies, Digital Operations, and Digital Experiences. It has established products in Intelligent Document Processing, Robotic Process Automation, AI/ML models, Smart Workflows, Business Intelligence, and Automatic Fare Collection.

Datamatics caters to a diverse global clientele across Banking, Financial Services, Insurance, Healthcare, Manufacturing, International Organizations, and Media & Publishing. The Company has a presence across four continents with significant delivery centers in the USA, India, and the Philippines. To learn more about Datamatics, visit www.datamatics.com

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