

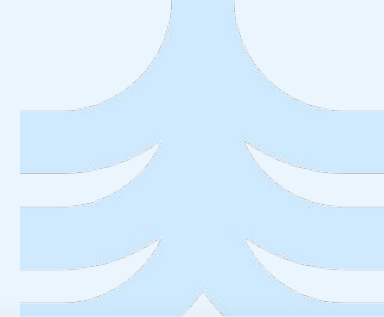
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Voice of the Insurance Broker

Digital FY25



Forward Looking Statements



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This presentation contains forward-looking statements about, among other things, trend analyses and statements regarding future events, anticipated growth and industry prospects, and our strategies, expectation or plans regarding product releases and enhancements. The achievement or success of the matters covered by such forward-looking statements involves risks, uncertainties and assumptions. If any such risks or uncertainties materialize or if any of the assumptions prove incorrect, results or outcomes could differ materially from those expressed or implied by these forward-looking statements. The risks and uncertainties referred to above include those factors discussed in Salesforce's reports filed from time to time with the Securities and Exchange Commission, including, but not limited to: our ability to meet the expectations of our customers; uncertainties regarding AI technologies and its integration into our product offerings; the effect of evolving domestic and foreign government regulations; regulatory developments and regulatory investigations involving us or affecting our industry; our ability to successfully introduce new services and product features, including related to AI and Agentforce; our ability to execute our business plans; the pace of change and innovation in enterprise cloud computing services; and our ability to maintain and enhance our brands.

Financial Services Cloud for Insurance Brokerages



Brokerages face challenges for growth

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Higher Interest Rates
Slower M&A Activity



Higher Premiums
Potential for Client Attrition



Looming Retirements
Shortage of New Talent



Outdated, Legacy Systems
Trapped, Siloed Data



51%

of insurance firms
use three or more
systems to engage
with customers



Legacy Agency Management Systems can't keep up with modern Brokerage needs

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10%

believe current systems meet the unique needs of the Brokerage ¹

Lack of Flexibility

50%

of insurance agency data remains siloed, limiting insights and customer responsiveness ²

Trapped Data

30%

productivity gap for agencies that have not adopted **AI-driven** workflows ³

Limited Innovation

Producers and Account Managers working in silos undermines efficiency

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60%

of Producers report limited visibility into client interactions managed by Account Managers

Fragmented Client Experiences

Delayed Insights

Inefficient Workflows

Duplicate Data Entry



50%

of Client Account Managers face delays in accessing client information from Producers.

Announcing Financial Services Cloud for Insurance Brokerages

GA
Spring
'24

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Unify Producers and Account Managers on a Customer-Centric Platform



Simplify and automate the Client journey, from placement to renewal



Easily extend and tailor workflows for the unique needs of the Brokerage

The screenshot displays the Salesforce interface for an insurance brokerage account named 'Sally's Aviation Charter'. The interface is organized into several sections:

- Account Overview:** Displays contact information for Richard Dun (+1(987) 654-3210, richard.dun@email.com) and the location (Mission St Branch, Austin, TX). It also shows the Line of Business (P&C, Employee Benefits), Potential Revenue (\$160,000), and Existing Carriers (Cigna, Kaiser, Cumulus).
- Interaction timeline:** A vertical timeline showing recent events: 'Employee Benefits Plan Renewal' (Completed | December 16, 2023), 'Conducted HR Handbook Review' (Completed | September 6, 2023), and 'Aviation Regulations and Coverage' (Scheduled | July 10, 2023).
- Policies (3):** A list of active policies with details such as Policy ID, Writing Carrier, Effective Date, Renewal Date, and Line of Coverage. The policies listed are CP-0032421A, WC-013932-5, and AV-29930-001.
- Alerts:** A section for upcoming changes and risks, including 'Upcoming C-Suite change in less than 2 months; new CXO, CRO and CIO' and 'Potential Attrition Risk in Commercial P&C due to low NPS and CSAT indicators'.
- Opportunities:** A section for potential business opportunities, including 'Sally's Aviation Charter' with a commission estimate of \$120,000.
- Broker Of Record (3+):** A list of brokers, including Marine BOR, Medical BOR, and others.

The interface is modern and user-friendly, with a clear navigation bar and a search function. The overall design is clean and professional, reflecting the high-quality standards of the #1 AI CRM.

Modernize Brokerage Operations on the #1 AI CRM

Modernize Brokerage Operations with Financial Services Cloud

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Account Team Productivity

Improve efficiency and collaboration with workflow tools and AI automation

Commissions and Revenue

Manage producer splits, commission statements, and expected revenue

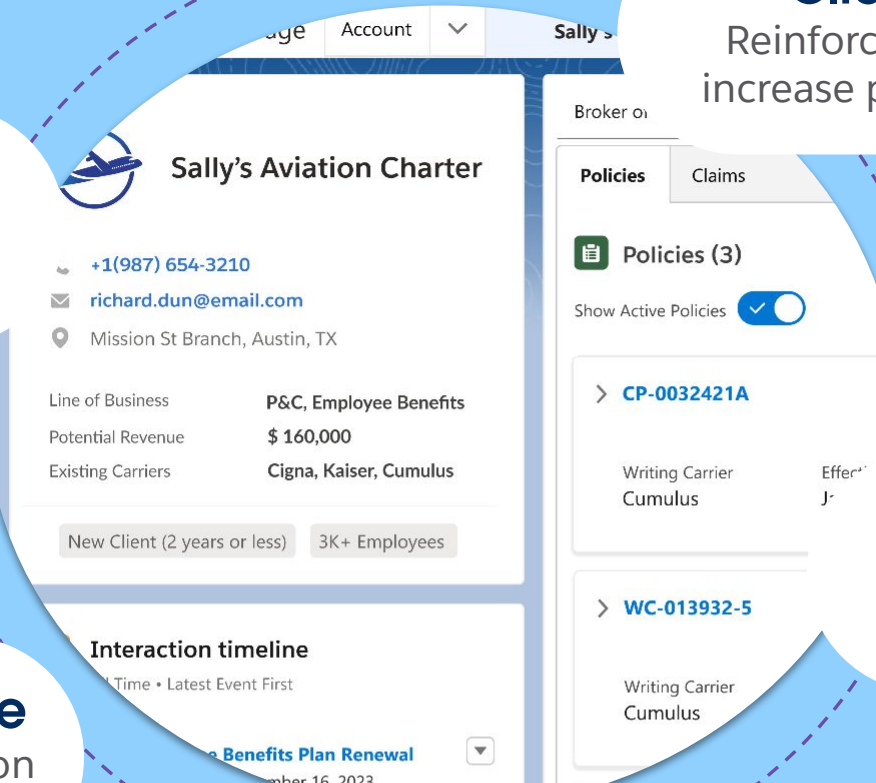
Financial Services Cloud for Insurance Brokerages

Client Engagement

Reinforce ongoing relationships; increase penetration and retention

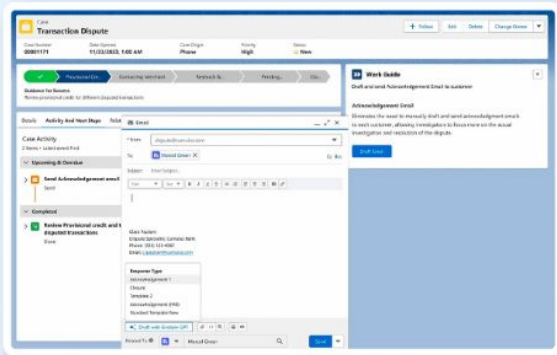
Policy Servicing

Single platform; line of business oriented applications



Your Playbook for Trusted Generative AI

Agentforce

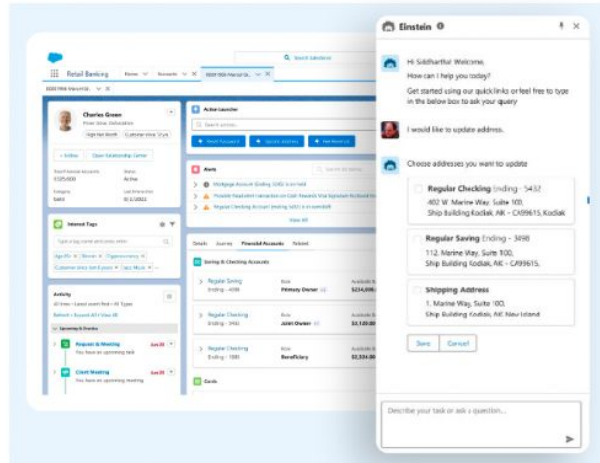


Embedded AI

Pre-built, ready-to-use AI tools embedded in the flow of work. They are user-friendly and require little to no technical expertise to deploy and use.

Example

"XX"



Assistive Agent

Employee-facing agent designed to streamline brokerage processes by handling smaller, manual tasks, allowing humans to concentrate on more complex tasks and delivering superior Client experiences.

Example

"XX"



Autonomous Agent

Customer-facing agents that can complete tasks autonomously, seamlessly handing off to human agents when a guardrail is approached or a task becomes too complex

Example

"XX"



Insurance Brokerage Data Model and Workflows

AI Agents for Insurance Brokerages

Key Use Cases

Automated Customer Support

(i.e., Certificate requests, inquiries, etc.)

Broker of Record Valuation

(i.e., Assess client valuation based on similar client profile)

Client Onboarding Agent

(i.e., fact finding, add & insert plans & policies to recently won clients.)

Coverage Risk Assessment

(i.e., Identify gaps in coverage, suggest coverage options)

Plan Benchmarking

(i.e., Identify strengths & weaknesses of benefits, contribution, and rates compared to industry)

Client Attrition Risk

(i.e., Assess risk based on aggregate interactions, brokerage & employee turnover, NPS, CSAT)

Account Manager Assistant

(i.e., schedule meetings, takes notes, creates tasks, client follow-up)

Policy Renewal Management

(i.e., Automation, policy renewals, data entry, communication, RFI/RFP)

Alliant's Digital Transformation



Opportunity

Enhance existing Salesforce implementation to consolidate processes, eliminate redundant systems, transform their user experience, and improve data quality.

Solution

Salesforce – with a strong focus on Financial Services Cloud – was leveraged to create a data-first, automated, and unified system that transformed their user experience and greatly improved Alliant's ability to collect, audit, and activate client data.

Alliant launched Client Central 3.0, an intuitive, end-to-end solution for account and plan management. Users can now manage plan details, compliance, project tracking, document generation, client revenue, carrier contacts and internal teams – all in one place with data that is easy to enter, visualize, and use.

Alliant streamlined their user experience into a single interface, increased team efficiency, improved data quality, and elevated the platform to more easily scale while lowering costs.

350%

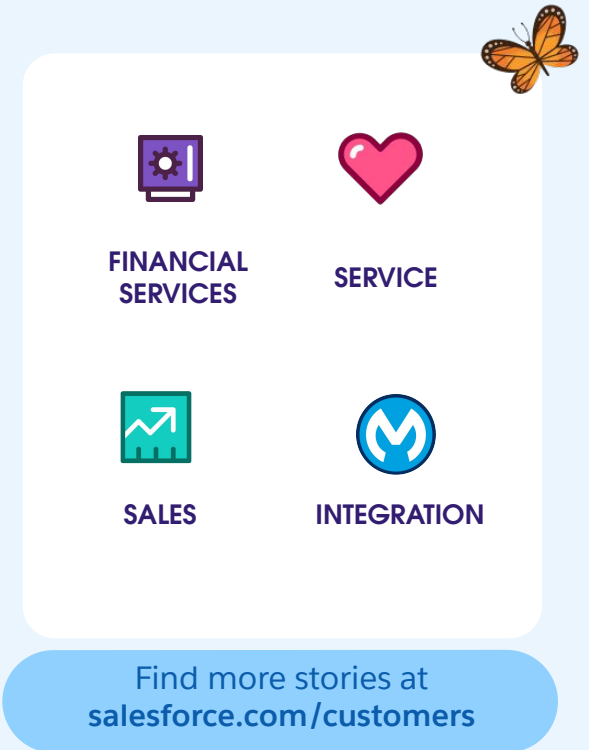
Improvement in
data completeness

30%

Increase in
user adoption

10%

Improvement in
team efficiency



Empowering their agency to drive efficiency and improve margins on a C360 platform

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AssuredPartners

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Streamlines agency and producer onboarding via data integration, work orchestration, and collaboration

Enhances productivity and conversion rates for 1,500 producers by enabling consistent sales processes

Provides 360 views of prospects and clients via Financial Services Cloud (FSC), driving sales growth through upsell and cross-sell activities

Delivers a unified desktop powered by FSC connecting 80+ AMS systems to deliver a single source of truth

Enables streamlined routing for service inquiries to the right agent or broker based on client need – an improvement from previous platform that led to disconnected process


**FINANCIAL
SERVICES**


ANALYTICS


EXPERIENCES


INTEGRATION


Platform

Highest Pipeline Ever

Achieved with Salesforce

11% Growth

Since implementation
(Same-store sales)

\$5M

Saved in technical debt

85% Adoption

Of Financial Services Cloud

AssuredPartners Transformation

Financial Services Cloud at the heart of it all

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Allows us to build a customer centric connected enterprise with automation and seamless data movement while maximizing return on strategic investments.



1. Retail Sales

• New • Business Renewals



2. Wholesale & Speciality

• Keenan Upgrade • CRM Rollout



3. Retail Sales

• New AMS • Portal • Accounting



4. M&A

• Leads • LOI



6. Cross Sell/Up Sell

• Accept • Decline • Refer • Reporting



5. Benefits Platform

• Pilot • Retail Pilot



7. P&C Platforms

• P&C • Personal



8. Global Platforms

• Assessment • Pilot

2025+

2024

2023



Leverage the power of Salesforce's open architecture and AI features to deliver new capabilities across different business lines.

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Thank you



Salesforce Insurance Resources

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Watch Agentforce for Insurance #ILoveInsurance

*See how Agentforce for
Insurance Drives Efficiency*



See FSC for Insurance Brokerages Press Release

*Read our Product
Announcement Press Release*



Watch Insurance Brokerage Dreamforce Session

*Featuring Alliant,
AssuredPartners and NFP*

