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FSConnect
Advisors

FSConnect for Insurance Agents and Wealth Advisors combines Salesforce Financial Services Cloud and best-in-class vendor partner capabilities, giving insurance agents, retirement advisors, and clients an ecosystem of leads, sales, and fulfillment tools to better learn about customers, engage, provide advice, and acquire products in a reimagined way.

FEATURES

Pre-defined personas & journeys
Insurance-specific journeys created with careful consideration for and understanding of both individuals and the ongoing innovations that seek to alleviate common pain points surrounding the moments that matter.

Connected ecosystem
More than 10 vendors have been curated to consolidate industry-leading products and internally developed assets into a single space, producing a unique, seamless user experience with real-time data persistence.

Lead qualification & management
Agent notification coupled with prospect intelligence paves the way for almost instant qualification and outreach, eliminating the possibility of lost leads and promoting quick engagement for faster conversions.

AI-driven information capture
Automated bot outreach via Email and SMS initiates customer conversations to begin gathering data that will persist across the ecosystem. This supplements the agent's activities and lays the foundation for a more productive first meeting.

Digital engagement & advice
Leverage personal and financial needs intelligence to engage in advice planning and produce dynamic product illustrations and recommendations tailored to the customer. Then build a digital document briefcase to deliver content and track individual engagement.

Unified application & onboarding
Enable application and onboarding in a single, unified transaction that leverages pre-populated data and extensive integrations with CRM, underwriting, and e-Sign tools. Immediately run point-of-sale compliance workflow to complete and deliver product confirmation.

BENEFITS

- Enhances customer accessibility to insurance products and improves the overall ease of purchase
- Seamless transitions and integrations among industry-leading tools provide agents with a powerful toolbox to traverse the customer lifecycle
- Deeper understanding of customer needs to identify the right products for a win-win interaction
- Automation and data availability allows greater focus on relationship building and point-of-sale execution to increase sales efficiency
- Quick application turnarounds and minimized possibility of sales leakage between application and issue stages

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