



## Case Study | Imeriti

**Industry:** Annuity and Life Insurance Wholesaler

**Location:** Olympia, WA

**Project:** Replace expensive vertical market software application with Salesforce.com & Force.com

### Company Overview

Imeriti is a leading annuity and life insurance wholesaler for financial institutions, broker dealers, independent life insurance agents, property and casualty agents and independent marketing organizations.

### The Problem

Imeriti's costs were high for a vertical market product that allowed them to track case management, underwriting requirements, and commission tracking related to their insurance business. Imeriti was not getting good value from this software as it was not fully automated resulting in errors made. Imeriti was using Salesforce for sales automation and knew the power of Salesforce. Imeriti's CIO had a vision of building a solution in Salesforce to replace what their vertical market app was doing, while having the ease of use and automation of Salesforce.

### How We Helped

Utilizing the advanced functionality of Salesforce Enterprise Edition including Visual Flows, StarrData designed a solution that simplifies their processes and automates them. Visual Flows enable users to accurately choose data from drop-down lists that have been culled from the most current information available. Users are no longer tied to spreadsheets and tables to manually enter data.

Visual Flows walk users through the record creation process and returns choices or questions based on previous answers. All current carriers, products, and commissions are in the system and can be accessed more quickly and accurately than with the old system. Visual Flows will significantly reduce human error and save Imeriti time and resources.

### Work Includes:

- Replaced vertical market software with customized Salesforce and Force.com
- Created Workflow automation and Visual Flows to automate case management, underwriting requirements, and commission tracking

### Expected Results

- Reduction in time spent inputting data
- Reduction in human errors
- Records can be easily updated individually or in mass
- Increase in accuracy of reporting

*"I worked with StarrData and its team members for several months developing a custom application for our company. I was amazed at how quickly and accurately they learned about our business, processes, and what we were trying to accomplish. The communication between our team and theirs was top notch. And their development was spot on. More often than not, they completely understood what we wanted and included it in the project on the first attempt. This far exceeded my expectations. They were efficient, professional, and most importantly - great developers. I would highly recommend them to anybody looking for custom Salesforce development."*

– Lloyd Silver, Former CTO, Imeriti

**Want to see these kinds of results for yourself? Give us a call today at (888) 391-4493 x101.**

