starrdata

IMERITI CUSTOMER SUCCESS STORY

COMPANY
Imeriti

INDUSTRY
Annuity and Life Insurance Wholesaler

OBJECTIVE
Replace expensive market software applications with an automated data system allowing Imeriti to manage cases, meet underwriting requirements, and track commissions related to business.

WHY
Imeriti not only needed to save time by not having to enter data manually, but they needed to have confidence that IT was free of error, could easily be pulled, and was meticulously organized. They also needed a way to share this information with their customers via an online portal.
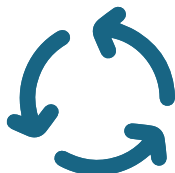
TECHNOLOGIES & SERVICES USED

salesforce service cloud

Platform Licenses

Visual Flow

SarrData's Salesforce Implementation

CUSTOMER QUOTE

"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, Imerit

BEFORE

Imeriti was spending far too much money on a product that was not providing them with the value they were seeking. Not only was it difficult to manage cases and business procedures, but the software was not automated, resulting in frequent errors. The time spent manually entering data into the software needed to be allocated to other business procedures within Imeriti.

Additionally, case status updates and commission information was being shared with customers via email and quickly became outdated.

AFTER

Utilizing the advanced functionality of Salesforce Enterprise Edition, including Visual Flows, StarrData designed a solution that simplifies and automates their processes. Visual Flows enables users to accurately choose data from drop-down lists that have been pulled from the most current information available. Users no longer need to manually enter data, significantly reducing human error and saving Imeriti time and resources.

Visual Flows walks 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 quickly and accurately.

Imeriti's customers had access to an online portal where they could view case status and receive details on commissions.

RESULTS

- Reduction in time spent inputting data through customized automation implementation
- Records and information can be easily accessed and updated individually or in masses
- By no longer having to enter data manually, Imeriti has confidence that their data is free of error
- Increased customer satisfaction by having 24/7 access to case status and commissions