

# SmartCOMM™ for Salesforce

## Insurance

A SMART Integration for Enterprise Document Generation and Customer Communications Delivery

Insurance organizations are faced with intense competition and heightened customer expectations. Technology stands out as the transformative force, providing solutions to optimize operations, elevate customer experiences, and drive innovation, enabling insurers to create an integrated ecosystem that will expedite underwriting and claims processes, delivering the personalization that policyholders demand. By embracing digital channels, insurers cultivate stronger customer engagement and harness insights for risk assessment, enabling them to not only address challenges but also pave the way for a dynamic future – characterized by efficiency, adaptability, and a customer-centric approach.

### Delivering More Than Just a Document

SmartCOMM from Smart Communications is an industry-leading, cloud-based document generation (DocGen) and customer communications management (CCM) solution that directly integrates with Salesforce Cloud platforms for a seamless user and customer experience.

SmartCOMM for Salesforce gives insurance organizations the power to deliver unbeatable policyholder experiences across policy, billing and claims with transformative capabilities such as dynamic document generation, personalization, collaboration, and contract negotiation. Extending these enterprise-class capabilities across the Salesforce ecosystem, SmartCOMM for Salesforce is leveraged by many leading insurers that need to deliver communications at tremendous scale, across multiple communications channels, all while maintaining the highest level of compliance.

### SmartCOMM Integration Points:

- Financial Services Cloud
- Sales Cloud
- Service Cloud
- MuleSoft Anypoint Platform

### Insurance Lines Supported:

- Property & Casualty (P&C)
- Life Insurance

### Use Cases Supported:

- Policy Generation
- Billing Statements
- Welcome Kits
- Notices
- Policy and Claims Correspondence

## Key Benefits

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### **Improve Customer Experience**

Engage customers with tailored, professional, and personalized communications that are brand-consistent, relevant, and provide meaningful value.



### **Optimize Customer Engagement with Smart Templates**

One Smart Template can accomplish the power of hundreds compared to other solutions. Generate documents in multiple channels, languages, legal jurisdictions, and brands all from one template.



### **Manage Complexity and Compliance**

Integrate SmartCOMM across your Salesforce ecosystem and other enterprise platforms that require customer communication touchpoints. All communication changes are tracked and fully auditable to work in the strictest of compliance landscapes.



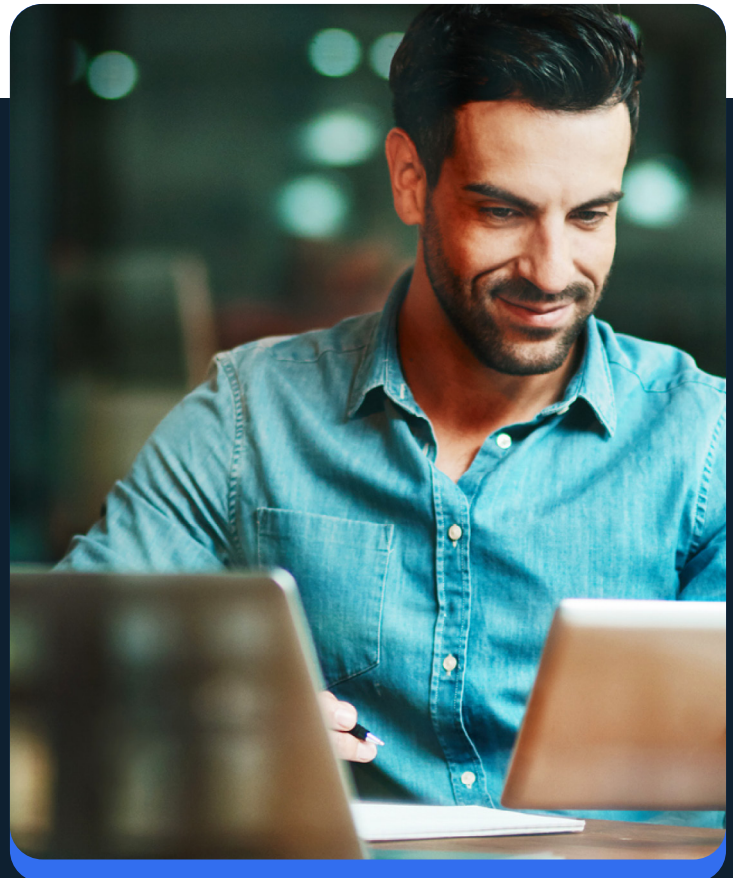
### **Scale to Add New Channels**

Future-proof your organization by easily adding new communications channels and seamlessly orchestrating conversations across them.

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“Our people should be spending more time providing added value to the customer and partner relationships than spending time doing word documents and on process items.”

- Ian-Edward Stafrace, Chief Strategy Officer,  
Atlas Insurance



## Capabilities

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### The Power of SmartCOMM for Salesforce

With SmartCOMM and Salesforce, you streamline your processes and enable your business users to work more efficiently while handling customer and business requests.



#### **Generate Professional Documents and Communications**

Create graphically and data rich communications using charts, graphs, images, video or social media content while adhering to brand guidelines such as colors and fonts.



#### **Optimize Content for Maximum Impact**

Our Content Intelligence capabilities allow you to optimize the readability, tone, and sentiment within your communications, enabling you to focus on what you are striving for – truly engaging with your customers.



#### **Grant Business-user Control**

Give designers, SMEs, and front-line employees intuitive tools to update templates and content giving them ownership and control of their communications. Improve agility, personalization, and time-to-market allowing IT to manage releases and focus resources to provide strategic value elsewhere.



#### **High Volume Batch, On-demand, and Interactive Use Cases**

Meet on-demand communications and interactive scenarios while also managing your large batch customer communications use cases – all from an integrated solution.

## Additional Capabilities

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- Powerful Template Design**  
Automate the selection and personalization of communications with intuitive, browser-based template design.
- Integrated Correspondence Editing**  
Easily update documents, select pre-approved content, and finalize conversations for delivery across formats with the integrated Draft Editor.
- Responsive Design**  
Create, test and troubleshoot communications on mobile devices and tablets to ensure error-free communications, optimized for the customer's specific device every time.
- Document-Driven by Data and Content**  
Leverage dynamic data driven document templates to compose tailored customer communications with the click of a button within Salesforce.
- Multiple Output Channels**  
Output to support print (Postscript, AFP, PDF), HTML, and digital channels (email, SMS).
- Seamless Data Access**  
Rapid integration with your existing Salesforce systems data using standards-based interfaces.
- Secure Collaboration**  
Securely collaborate on documents with external parties in a controlled browser-based tool with role-based access and unbreakable audit trails to achieve higher levels of compliance while reducing risk.
- Ability to Integrate E-Signature**  
Automate processes by integrating with leading e-signature vendors.

### Smart Communications is a Recognized Industry Leader

CELENT

Gartner

IDC

ASPIRE | LEADERBOARD

datos  
INSIGHTS

FORRESTER®

**SMART**  
COMMUNICATIONS™

salesforce



Visit the [Salesforce AppExchange](#) and search 'SmartCOMM' to experience SmartCOMM™ for Salesforce.