



TechCanary Insurance Standard for Salesforce



ACORD® and CSIO data model standards inside Salesforce

The Only Complete Insurance Data Model Implementation on the Market

The TechCanary Insurance Standard (TC-IS) implements the complete ACORD® and CSIO standard data models inside Salesforce. It provides a foundation for you to configure Salesforce to support your unique way of doing business and still confidently interoperate with your back-end systems and those of your partners. With a fast time-to-value and low total-cost-of-ownership, TC-IS provides a level of policy detail and depth you've never had before, all within Salesforce.

Fast Time-to-Value

TC-IS pre-populates standard insurance data objects, hierarchies, fields, field types, attributes and relationships into Salesforce to create an industry-specific CRM integrated with Salesforce leads, contacts, accounts and opportunities:

- Works with Salesforce Sales, Service, Financial Services, Marketing and Analytics Clouds
- Provides a framework with everything you need for Property & Casualty insurance

Low Total-Cost-of-Ownership

TechCanary has done the hard work for you, putting in thousands of research and development man-hours understanding the standards and turning the logical data model into a ready-to-go database implementation inside Salesforce.

- TechCanary is a member of CSIO and ACORD® and an active participant in working groups.
- TechCanary monitors the standards and updates the foundation so you don't have to.

Unparalleled Policy Detail and Depth

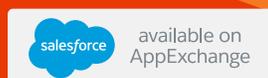
The members of the standards bodies have developed a very comprehensive business glossary with over 4,000 insurance-specific business concepts that represent everything an insurance company generates and uses. They've then used an information model to organize these concepts and define their relationships. TC-IS takes the data model representation of the information model and implements it in Salesforce as a complete database implementation.

- All the standards' classes, attributes, associations and inheritance between classes
- All the standards primary keys, foreign keys and discriminators
- All the standard's formats and protocols
- All the relationships between functions and lines of business

Interoperability and Data Exchange

The standards exist to create a seamless data exchange between agency and broker management systems and insurance companies, resulting in efficient workflows and lower costs across the insurance industry. Using TC-IS as the foundation for your Salesforce implementation assures:

- Support for AL3 (EDI) and XML standards
- Easy integration with back-end systems
- Interoperability between agency, broker, carrier, MGA/MGU and 3rd party systems



Real-time Policy and Customer Analytics

By leveraging all the strength of the Salesforce Analytics Cloud and Einstein, TC-IS drives better sales and service prioritization — in real-time — using data inside and outside your organization.

- Analyze policies at a new, deeper level of depth
- Analyze policies holistically from a customer perspective to determine current levels of coverage — not one policy at a time
- Analyze by demographic, regions, and more

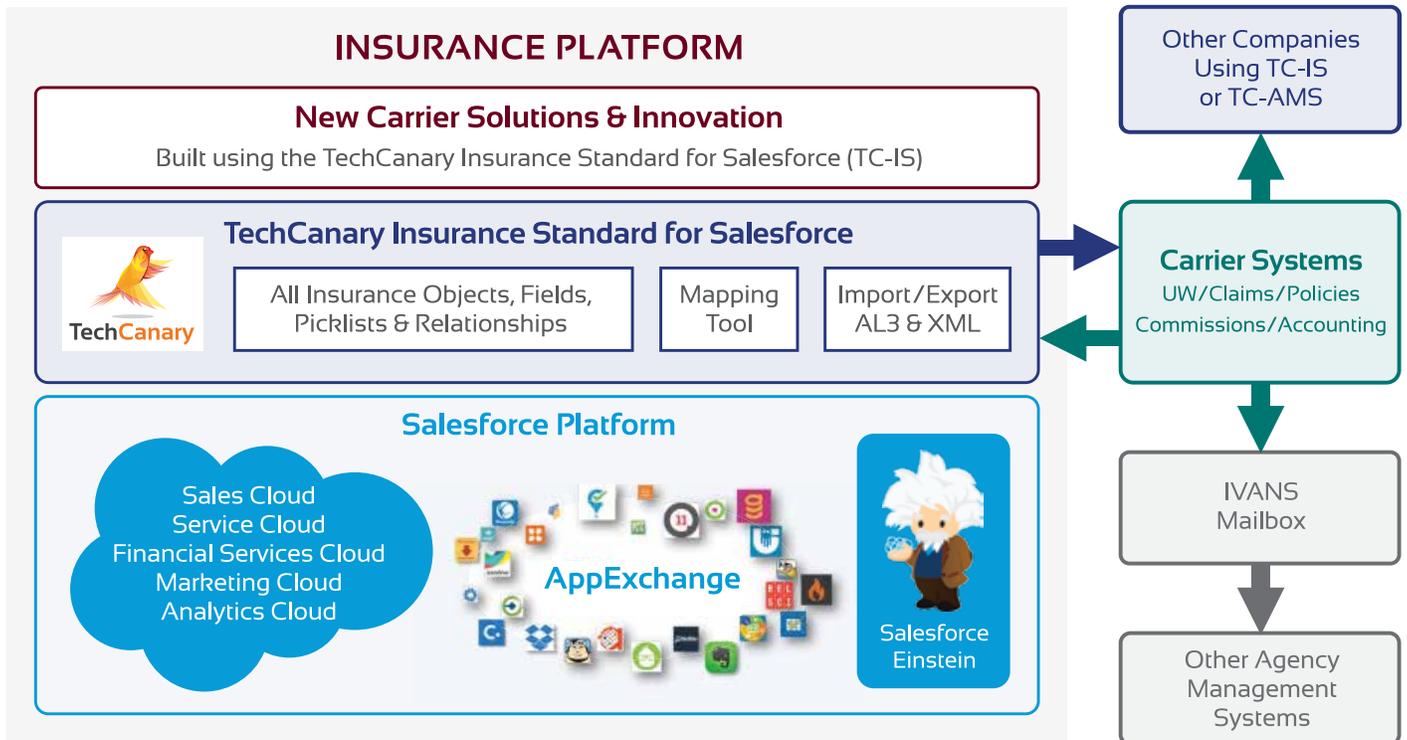
Customer-centric View of Your Business

With the TC-IS implementation of the standards’ policy detail inside Salesforce, you can take a customer-centric view of all policies instead of analyzing each policy individually.

- Associates quotes and policies with Salesforce leads, contacts, opportunities and accounts
- Defines relationships between lines of business
- Informs sales and marketing initiatives and campaigns
- Identifies upsell opportunities

Future-Proof Standard Compliance

With TC-IS, you don’t have to worry about which system schema and structure is the best investment long term since TechCanary has done the heavy lifting for you using the ACORD® and CSIO standards.



About TechCanary

The TechCanary mission is to provide the insurance industry a new and innovative alternative to legacy agency management systems and generic CRM and call center solutions — and be the first to provide an enterprise-wide, consolidated view of customers. TechCanary, a leading InsurTech company, is always thinking ahead, anticipating the unanticipated, and innovating. We exist to make our customers successful through our technology.



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