



# Sterling & Sterling Fosters Close, Real-Time Collaboration with Insurance Clients and Drives Revenue Growth with Informatica Cloud

## HEADQUARTERS

Woodbury, NY

## WEBSITE

[www.sterlingrisk.com](http://www.sterlingrisk.com)

## FOUNDED

1932

## INDUSTRY

Insurance

“Informatica Cloud bridges the gap between Sterling & Sterling’s agency management system and the cloud, ensuring that sales reps, brokers, and agents have a 360-degree customer view and insight into customer needs. The result is a greater opportunity to capture cross-sell opportunities and make them customers for life.”

—Mike Tampone, Director of IT, Sterling & Sterling

## The Challenge

Sterling & Sterling is among the United States’ top 100 insurance brokerages and one of the largest in the United States, with premiums exceeding \$400 million. The company’s services include property and casualty insurance, employee benefits consulting, and risk management. Double-digit growth in the past five years has prompted the firm to deploy Salesforce CRM to streamline business processes and better manage relationships with customers, brokers, and agents on both the East and West coasts.

The challenges for the company were twofold. First, Sterling & Sterling needed to perform a one-time migration from the existing SalesLogix customer relationship management (CRM) system to Salesforce CRM. Second, the company needed to integrate Salesforce CRM with the existing implementation of The Agency Manager (TAM), an on-premise automated insurance management system from Applied Systems, which underpins the company’s insurance services delivery. This Cloud integration would provide the company with a single, unified, multichannel view of the property and casualty business, including lead generation, account management, and client insurance portfolio management.

Sterling & Sterling needed to:

- Drive revenue growth through improved cross-selling, up-selling, and consistently rewarding service
- Manage insurance client relationships without additional software, hardware, or up-front investments and long implementations of traditional on-premises software
- Reduce data integration time and increase agility

## The Solution

Following recommendations from both salesforce.com and the Informatica INFORM systems integrator partner Silverline, Sterling & Sterling deployed Informatica® Cloud to ensure that the combined Cloud-based Salesforce CRM and on-premise TAM data is accurate, complete, up-to-date, and fully synchronized. Informatica Cloud delivers powerful data loading from TAM to Salesforce CRM and advanced scheduling to automate a multistep, one-way integration between the two systems—all via an intuitive Web-based integration wizard, which is easy for Sterling & Sterling's nontechnical users to administer and manage. The company already has a unified view of accounts, contacts, and clients' insurance policies, and it anticipates adding transactions and claims very soon.

The one-time export of data from SalesLogix to Salesforce CRM was performed in tandem with the integration program and was equally successful. Sterling & Sterling was having considerable difficulty with the migration because SalesLogix resided in a SQL database consisting of hundreds of thousands of records across multiple objects. Informatica Cloud came to the rescue, enabling the migration to take place over the course of one weekend with minimal involvement from technical staff—a feat that was 50 percent faster than many on the team had anticipated.

## Key Benefits

Using Informatica Cloud, Sterling & Sterling has introduced a higher degree of agility into the business. Hundreds of thousands of insurance records, for example, were migrated from SalesLogix to the Salesforce CRM in one weekend, and the company integrated Salesforce CRM with the TAM platform in just two weeks. Moreover, by undertaking up to 90 percent of the integration tasks in-house using minimal IT resources, Sterling & Sterling reduced integration costs by 30% and increased its return on data.

The new unified environment is helping to foster close, real-time collaboration with customers and carriers, driving revenue growth. At the same time, Sterling & Sterling's streamlined sales processes are now taking more customers from product and service inquiry to bound policy holder and maximizing the sales opportunity for every renewal. This automated, coordinated, and standardized approach to service delivery is also accelerating decision making through drill-down, real-time insight into the business and is supporting faster, more accurate data search in Salesforce CRM.

## About Informatica

Informatica Corporation (NASDAQ: INFA) is the world's number one independent provider of data integration software. Organizations around the world rely on Informatica to gain a competitive advantage with timely, relevant and trustworthy data for their top business imperatives. Worldwide, over 4,500 enterprises depend on Informatica for data integration, data quality and big data solutions to access, integrate and trust their information assets residing on premise and in the Cloud. For more information, call +1 650-385-5000 (1-800-653-3871 in the U.S.), or visit [www.informatica.com](http://www.informatica.com).

## HIGHLIGHTS

### GOAL

Enable fast-growing insurance brokerage to integrate cloud-based Salesforce CRM with existing on-premise automated insurance management system. Simultaneously migrate hundreds of thousands of client records from SalesLogix CRM system to Salesforce CRM.

### SOLUTIONS

- Informatica Cloud
- Salesforce CRM
- Applied Systems TAM

### RESULTS

- Led to 30% decrease in integration costs
- Migrated all insurance records from SalesLogix to Salesforce CRM in one weekend—50 percent faster than anticipated
- Enabled firm to segment and target its most lucrative insurance clients
- Integrated Salesforce CRM with TAM platform in two weeks
- Fostered close, real-time collaboration with customers and carriers, driving revenue growth
- Empowered Sterling & Sterling employees via integrated Salesforce Chatter private social network
- Introduced automated, coordinated, and standardized approach to service delivery



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