



"The industry and Salesforce expertise of the Plative team is second to none. They provided solutions specific to our business model and communicated our implementation plan effectively. We look forward to continuing our partnership with Plative."

-The Buckner Team



Headquartered in Salt Lake City, Buckner has seven offices in three states: Utah, Idaho, and Colorado. Growing from its founding team of three employees to the 200 employed today, the agency is one of the largest and fastest-growing in the western region. The full-service brokerage provides insurance, employee benefits, bonds, and risk management. Buckner is a Top 100 Independent P&C Agency and has been listed as one of the fastest-growing private companies in America.



Plative is a Salesforce Premium Implementation partner as well as an Oracle NetSuite Alliance Partner. As a global consultancy, Plative builds long-lasting partnerships with some of the world's leading financial services firms to strengthen relationships, streamline processes and surface insights.

Business Case

Buckner wanted to switch to Salesforce to be less reliant on Excel and separate worksheets. They needed increased collaboration between the Producers and Services teams and visibility of information across both teams. Their Producers use Applied, so they also needed the integration with Salesforce for Accounts, Contacts, and Opportunities to sync between platforms. Lastly, Buckner needed a marketing platform to improve email marketing and a tool to streamline meeting scheduling.

Solution

Salesforce Financial Services Cloud (FSC) was implemented to support Leads, Accounts, Person Accounts, Contacts, and Opportunities. **The Salesforce Insurance module of FSC** was enabled to track policies. An Applied Epic integration allowed Applied data to flow into Salesforce including policy lines, renewals, and sales metrics. **Outlook, ZoomInfo, and GoToMeeting** were also integrated to use and monitor within Salesforce. Lastly, **Salesforce Pardot** was configured for their marketing automation needs.

Outcomes

This solution improved the tracking of deals and renewals from Producers and it streamlined the information flowing in from Applied to Salesforce. It allows teams to track activities, next steps, and values all within Salesforce. The productivity of Buckner Producers improved with the GoToMeeting dial-out information readily available on Salesforce records. Email and lead tracking were improved with the Outlook and ZoomInfo integration and Pardot provided a single platform for marketing automation.