

Engineering a Digital Front Door for 36,000+ Property Brokers

How 360Vantage Labs delivered a greenfield Salesforce Experience Cloud and Financial Services Cloud portal in under 6 months—synchronizing 25M+ records via Snowflake with zero UAT defects.

LAUNCHED

Kickoff to go-live in <6 months

CONNECTED

700K+ policies & 13K+ agencies

VALIDATED

31 of 31 UAT passed · 0 defects

SCALABLE

~25M records via Snowflake

Enterprise Scale Delivered in One Release

36K+

Brokers Onboarded

Unified across 13,000+ distribution agencies.

700K+

Policies Visible

Validated against live broker-agency hierarchies.

31/31

UAT Validations

Passed across 6 areas with zero open defects.

<6 Mo

Time to Market

12 features and 60+ user stories from scratch.

The Distribution Bottleneck in U.S. Property Insurance

WHOLESALE, FAIR PLAN & SURPLUS LINES

When Call Centers Become the Portal

As property policies surge into specialized carriers and Surplus Lines markets, lacking a self-service broker portal paralyzes customer service representatives (CSRs).

01 • CSR & Shared Mailbox Overload

Routine status checks and policy inquiries flood phone lines and unmonitored inbox queues.

02 • Dynamic Hierarchy Synchronization Gaps

Brokers change agencies daily; out-of-sync hierarchies risk exposing policies to unauthorized users.

03 • Untracked Broker-of-Record (BOR) Changes

PDF forms and email requests leave brokers blind to transfer status and compliance approvals.

Four Critical Broker Experience Challenges

CHALLENGE 01

No Digital Front Door

36,000+ brokers relied on call centers for routine checks.

CHALLENGE 02

Capped Policy Visibility

Core system capped views at 50 policies per screen.

CHALLENGE 03

Manual Untracked Requests

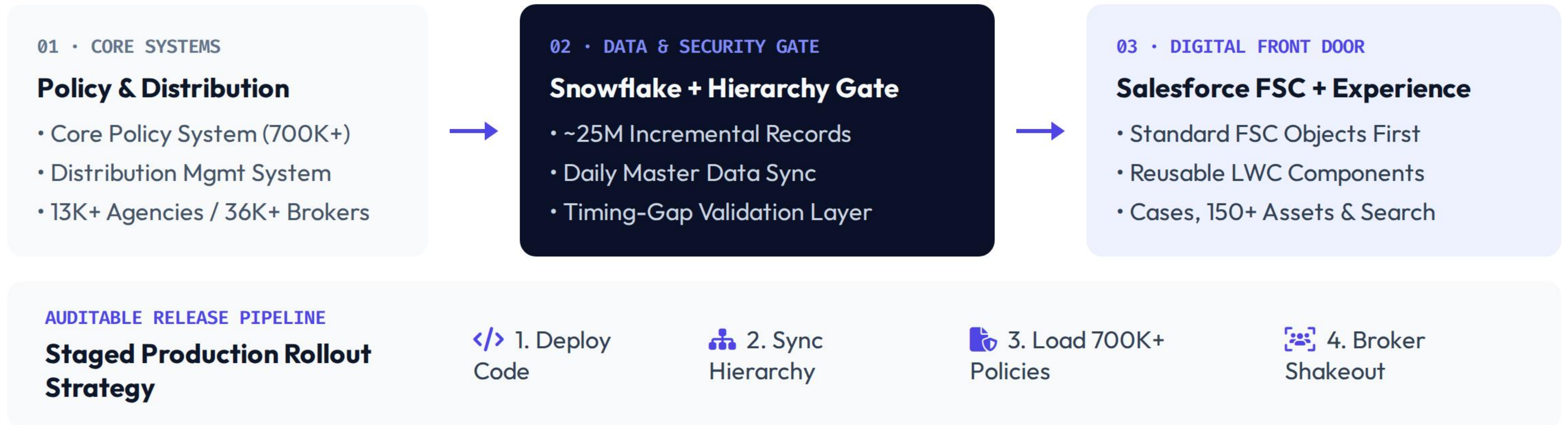
Broker-of-record and staff updates moved via static emails.

CHALLENGE 04

Unmeasured Email Blasts

Training and bulletins lacked completion or engagement tracking.

End-to-End Snowflake-to-Salesforce FSC Architecture



Built From Scratch: Self-Service, Cases & Content Hub

PoC to 60+ Stories

Evolved our proof of concept into 12 production features.



Tracked Case Workflows

Digitized Broker-of-Record and agency updates with live status.



150+ Training Assets

Centralized learning hub with read and completion telemetry.



Global Federated Search

Instant search across policies, cases, alerts, and advisories.

Reusable Lightning Web Components (LWCs) delivered a fast, cohesive user experience.

STANDARD FSC FIRST • CUSTOM WHERE IT COUNTS

High-Volume Data Engineering & Hierarchy Security

PILLAR 02 • POLICY VISIBILITY

700K+ Policies Without Core Access

FSC Data Model Mapping: Core policy records converted into standard Financial Services Cloud objects.

Timing-Gap Protection: Validation layer checks live agency-broker hierarchy before exposing any record.

Zero Core-System Load: Eliminates the 50-policy legacy view cap without granting core credentials.

PILLAR 03 • MASTER DATA SYNC

~25M Records via Snowflake

Daily Incremental Feed: Sourced from the distribution management system via Snowflake.

13,000+ Agency Hierarchy: Automatically reflects producer appointments, transfers, and terminations.

Engineered for Scale: High-throughput delta processing prevents Salesforce API governor bottlenecks.

Auditable CI/CD & Staged Production Rollout



The Blueprint for Surplus Lines California

25M+

Records Synchronized Incrementally

The closest operational analogue to a modern Surplus Lines filing and stamping portal.

Multi-Tier Broker & Agency Hierarchy

Handles thousands of Surplus Lines brokers, complex agency affiliations, and delegated authority rules out of the box.

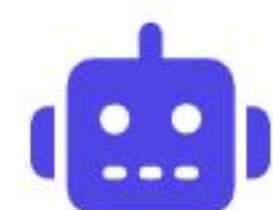
Tracked Submissions, Education & Rollout Safety

Combines structured regulatory filings, compliance advisories, and a staged rollout pattern that protects market continuity.

Unexplored Ideas: Zero-Copy Data & Agentforce

Zero-Copy Data Cloud

Bi-directional Snowflake federation eliminating daily batch ETL syncs.



Agentforce Broker Concierge

Autonomous AI agents answering guidelines and pre-validating BOR cases.



Real-Time NIPR / CDI Sync

Webhook verification of state broker licenses during onboarding changes.

Next-Horizon Distribution & Connectivity Ideas

Portal Domain	Release 1 Delivered	Unexplored Next Horizon	Strategic Impact
Agency Connectivity	Web portal self-service	HeadlessIvans / AMS360 APIs	Syncs 700K+ policies into broker AMS
Book Intelligence	Policy list & global search	Renewal Retention & CAT Heatmaps	Flags at-risk renewals 60 days early
BOR Transfers	Tracked Salesforce Cases	Embedded e-Signature & Auto-Hold	Automates incumbent waiting periods
Training Hub	150+ tracked content assets	Certification-Gated Quoting	Unlocks authority upon course pass

360VANTAGE LABS • SALESFORCE & CLOUD DATA PRACTICE

Ready to Launch Your Digital Broker Ecosystem?

From concept to 36,000+ brokers in under 6 months—combining Salesforce Financial Services Cloud, Snowflake data engineering, and zero-defect delivery.
