

# TITAN for Insurance Teams

## Run Submission, Underwriting, and Policy Workflows Inside Salesforce

Titan executes these workflows inside Salesforce, delivering governed visibility, structured approvals, and faster time-to-bind.

## Insurance Pain Points

- ⊗ Submissions arrive incomplete or without required supporting documents
- ⊗ Underwriting coordination happens across inboxes, attachments, and shared folders
- ⊗ Policy documents and endorsements sit outside Salesforce
- ⊗ Teams lack consistent visibility into review stages and decision status
- ⊗ Traceability is fragmented across systems and handoffs



**Result: Slower turnaround, increased workload, and governance risk**

## How Titan Works Inside Salesforce

### Structured Submission Intake

Brokers and clients complete secure submission forms through branded portals connected to Salesforce. Conditional logic enforces required data, disclosures, and supporting documents before submission. Submissions write directly to the correct Salesforce record with real-time visibility for underwriting teams.

### Underwriting Workflow Execution

Submission documents are generated from Salesforce data using standardized templates. Files move through structured review and approval workflows. Every action remains tracked on the Salesforce record for full visibility.



### Policy & Endorsement Processing

Policies and endorsements are generated from Salesforce data and routed for approval and signature. Signing is completed digitally with real-time status updates and automatic record storage. Post-signature updates trigger downstream workflow steps and lifecycle tracking.



### Without Titan

- External submission forms
- Manual underwriting coordination
- Policy documents managed outside Salesforce
- Email-based status updates
- Fragmented tracking & audit gaps



### With Titan

- Submissions validated in Salesforce
- Underwriting workflows executed in Salesforce
- Policies generated & signed in Salesforce
- Real-time status visibility
- End-to-end governed traceability

## Outcomes for Insurance Organizations

### ✓ Faster Time-to-Bind

Submissions move through underwriting and approval stages without avoidable delays.

### ✓ Fewer Incomplete Submissions

Required data and supporting documents are captured upfront.

### ✓ Lower Administrative Workload

Less time spent chasing updates, files, and approvals across systems.

### ✓ Audit-Ready Traceability

Documents, approvals, and signatures remain tied to Salesforce records.



## The Bottom Line

**Titan delivers the governed workflows that move policies forward.**

Insurance operations demand control, visibility, and auditability. Salesforce remains your system of record. Titan provides the governed execution layer that keeps submissions, underwriting, and policy processes connected and fully traceable within it.

