



Insurance Agency Management



CASE STUDY

INSURANCE AGENCY MANAGEMENT

Overview

An Insurance agency needed an easy way to manage their day to day tasks, analyze KPIs and several data fields from third party systems.

Real Challenges

The key requirements of the project were:

1. Ability to view and manage daily tasks and appointments.
2. Manage customers' communication and sales pipeline.
3. Review reports, sales and critical business performance metrics.
4. Provide job function based information and functionality to employees and agents.
5. Integrate with 3rd Party systems to receive quotes and submit claims.

Our Approach

We developed a comprehensive solution comprising of the following key features:

1. A web based interface for user interaction.
2. Light weight, real time integration with data feed providers and trading platforms.
3. Integrated general ledger.
4. Roles based security and auditing for segregation of duties for security.
5. Data encryption for data security
6. Rules engine to enable portfolio manager to quickly adapt to changing market conditions
7. Technologies used: MS .NET, C#, Flash,WCF and MySQL



Results



Time Savings

Time saving of 54% to manage investment rules.



Faster Reporting

Time saving of 23% for preparing client reports.



Improved Uptime

Increased up-time by 41%.



CUSTOM SOLUTIONS



WEB SOLUTIONS



MOBILE SOLUTIONS



CLOUD SOLUTIONS



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