

CASE STUDY

SALES-ENHANCEMENT TOOL DEVELOPMENT FOR INSURETECH COMPANY

Client Background

Our client is a financial company founded by technology-addicted professionals with the goal to create services that would provide a new level of online insurance services for both users (agents, brokers, providers etc.) and their clients.

Business Challenge

The client aimed to create intuitive online services that would empower agents, producers, brokerage general agents, financial institutions, and providers to boost sales in the insurance segment and bring new digital experience to business decision makers. The focus was on developing a product that would simplify the work of insurance representatives while creating a final proposition to their clients. The key challenge of the project was comparing, structuring, and analyzing the transactional data received from different providers.

Project Description

SoftServe partnered with the client to create a one-of-a-kind sales accelerating platform for the insurance industry. It needed to provide real-time information dashboards, mobile support, high impact sales content, and insurance-specific CRM across customers' businesses.

It was imperative that the solution contain the following functional modules:

- An analytical module for accurate and efficient business decision making,
- A module to compare carriers and their offerings,
- A compliance module to meet regulatory requirements,
- And a group of data visualization modules for a seamless customer experience.

SoftServe provided a full stack of activities when developing the product including:

- Architecture assessment and design,
- Configuration management,
- DevOps and maintenance,
- Development and migration (as necessary),
- And quality control with full technical support.

Value Delivered

The platform developed by SoftServe significantly increased the amount of insurance service sales by simplifying and elevating the user journey and experience of our client's employees (agent, broker, provider, producers etc.).

Using the new product, insurance specialists could conduct a comprehensive comparison of different insurance products for their clients on the go, increasing the effectiveness of sales across various distribution channels. It made the selling and buying of insurance services a fast and simple digital experience.

User benefits included but were not limited to:

- Interactive design and data visualization,
- Single data entry,
- Smooth user experience,
- Multi-format inputs processing,
- And wide functionality usage (including drag and drop and comparing actions for different data formats).

ABOUT US

SoftServe is a global digital authority and consulting company, operating at the cutting edge of technology. We reveal, transform, accelerate, and optimise the way large enterprises and software companies do business. With expertise across healthcare, retail, media, financial services, software, and more, we implement end-to-end solutions to deliver the innovation, quality, and speed that our clients' users expect.

SoftServe delivers open innovation – from generating compelling new ideas, to developing and implementing transformational products and services. Our work and client experience is built on a foundation of empathetic, human-focused experience design that ensures continuity from concept to release.

Ultimately, we empower businesses to re-identify their differentiation, accelerate market position, and vigorously compete in today's digital, global economy.

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