



Softvery

SOLUTIONS

CASE STUDY

DIGITAL TRANSFORMATION OF
INSURANCE CONSULTATION
PLATFORM (NDA)

INSURANCE PROVIDING COMPANY

21+

Complex workflows
automated

80+

Consultants using the
platform

1680+

Calculations automated daily

COMPANY GOALS

The client needed to transform their Excel-based consultation process into a modern web platform while maintaining all calculation capabilities.

- Transform complex Excel workflows into **web-based solutions**
- Create **unified** platform for all consultants
- **Automate** manual calculations
- Implement real-time **data validation**
- Enable dynamic **report** generation
- Improve client **presentation** capabilities

PAINS TO SOLVE

The client's consultation process relied entirely on complex Excel spreadsheets, leading to several critical issues:

- **Manual** data entry and calculation **risks**
- **Time-consuming** report generation
- **Inconsistent** Excel versions and manual calculation errors
- A **shared consultation platform** needed for 80+ consultants

OUR SOLUTION

We began with comprehensive analysis of existing Excel workflows and calculation models. Our approach enabled systematic transformation of manual processes into automated web-based solutions. The platform's MVP followed by continuous development of calculation modules:

- Developed a modern web platform **replacing 21+ Excel** worksheets
- Automated complex **calculations** including subsidies, retirement planning, and investment comparisons
- Implemented **real-time** validation and error checking
- Created dynamic **visualization** tools for client presentations
- Established **secure** multi-user environment with role-based **access**
- Provided continuous **support** and enhancement based on user feedback



PLATFORM ADMINISTRATION INTERFACE

The platform features two distinct, role-optimized interfaces. Each interface is tailored for its specific user role, ensuring efficient workflow and data security:

Admin interface:

- Complete system management
- Employee administration
- Client data oversight
- Analytics and reporting tools
- System configuration settings

Screens withheld under NDA

Consultant interface:

- Real-time calculation updates - with instant financial projections and scenario modeling
- Dynamic visualization tools - featuring interactive dashboards and comparative analysis charts
- Automated report generation - with standardized templates and branded formatting
- Multi-scenario comparison capabilities - enabling variable adjustment and outcome predictions
- Client data management - including personal portfolios and document storage systems
- Historical tracking - monitoring performance trends and consultation records
- Task tracking and activity reports - featuring progress monitoring and consultation summaries

Screens withheld under NDA

Screens under NDA

Administrative portal key functions:

- Create and manage consultant/admin accounts
- Control user access levels and permissions
- Monitor system performance and usage
- Activate/deactivate consultant accounts
- Track consultant activities and client assignments
- Generate system reports and analytics
- Manage system settings and configurations

CONSULTANT WORKSPACE & CLIENT MANAGEMENT

Client creation workflow:

- Basic client information (name, DOB, address)
- Family status and personal details
- Additional info including health parameters

Investment & support processing:

- Investment allocation tracking
- Funding status monitoring

Financial planning tools

- Savings comparison calculations
- Provider management
- Return on investment tracking
- Contract duration planning

Screens withheld under NDA

6

OUTSOURCED TEAMMATES
DEVELOPING A ROBUST
WEB PLATFORM

1 SOLUTION ARCHITECT

1 PROJECT MANAGER

1 UI/UX DESIGNER

1 DEVOPS ENGINEER

1 FRONTEND DEVELOPER

1 BACKEND DEVELOPER

Simplified Scrum approach due to the client's non-technical background, with biweekly demo presentations and flexible iteration-based sprint planning.



TEAM AND DELIVERY

AUTOMATED CALCULATIONS PANEL

Client retirement and support analysis:

- Subsidy calculations (§10a EstG, VermBG)
- Pension calculations
- Retirement gap visualization
- Investment projections
- Tax impact analysis

Investment comparisons:

- ROI calculations
- Risk assessment
- Tax benefit analysis
- Long-term projections

Property planning:

- Maintenance cost calculations
- Building savings analysis
- Investment requirements
- Cost-benefit comparisons

TECHNOLOGY STACK

- **Backend:** Laravel (PHP)
- **Frontend:** Next.js, Redux, Redux Thunk, Material UI
- **Database:** PostgreSQL
- **DevOps:** AWS, ECS, Terraform, Cloud Watch
- **Design:** Figma



CHALLENGES **OVERCOME:**

- Complex Excel formula translation to code
- Data validation and accuracy assurance
- User interface simplification
- Performance optimization for calculations
- Training material development
- Legacy data migration
- Multi-user support implementation

PROJECT **HIGHLIGHTS:**

Technical:

- Automated 21+ Excel workflows
- Implemented real-time calculations
- Created dynamic visualizations
- Developed secure multi-user system

Delivery:

- Impeccable communication with non-technical clients
- Met precise timeline goals
- Maintained calculation accuracy
- Improved consultant efficiency
- Enhanced client experience



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That's what Softvery is here for. Let's talk!

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