




# Web-based Managing General Agency Quote and Binding System

<p>Problem</p> 	<p>Our client, one of the largest MGA's in the country, migrated to a new, Windows-based Insurance Enterprise Management Solution as their core system. The company's brokers were coming from a web-based system and the new Windows client felt cumbersome and difficult to navigate. While full of features and containing a robust data model, the system did not provide a streamlined workflow for their brokers to easily market their submissions and get quotes quickly out the door.</p>
<p>Approach</p> 	<ul style="list-style-type: none"> <li>• Utilize the Software Development Kit (SDK) provided by new core system as much as possible so that all critical data was sent to the core system.</li> <li>• Employ an iterative development approach with pre-production releases at least once a month so the product owner could get their hands on the new product and solicit feedback from key users.</li> <li>• Utilize the Grails framework to decrease development time and gain efficiencies provided by the framework.</li> </ul>
<p>Solution</p> 	<ul style="list-style-type: none"> <li>• Taking advantage of the core system's SDK, there was no need to reinvent the wheel to accomplish tasks like state tax/fee calculation and document generation.</li> <li>• A dashboard style homepage to the application provides users with snapshot of their in-flight account, upcoming reminders, and their month-to-date transactions for sales goal tracking.</li> <li>• Developed a marketing feature to easily create campaigns to targeted groups of carriers. A powerful scheduling feature allows users to configure marketing emails to be released at a selected date and time.</li> <li>• Designed intuitive workflows for users to step through the quoting process.</li> <li>• Fully integrated with the company's existing document management system so that any correspondence or document creation is automatically archived.</li> <li>• Integrations with Microsoft Exchange Server allow users to drag and drop emails from their inbox directly into accounts for ease of archiving.</li> </ul>

## Results



- The strengths of the company's Insurance Enterprise Management Solution were leveraged while providing a modern user experience to the company's brokers.
- The solution saved time and money associated with deploying Windows clients for hundreds of users. Deployment costs were minimized by utilizing a powerful server for the web-based system and leveraging the existing IE browser included in the workspace of their users.
- Utilizing the core system's SDK provided consistent data collection and validations for front-end users of the Windows application and users of the web-based system.
- The ability to customize marketing campaigns and schedule emails gave users a competitive advantage by releasing campaigns precisely when they're allowed into the market.
- The brokers were happy to have a web-based system which integrated seamlessly with the company's existing applications.

“ With a smart and professional staff, Quad Nova not just builds what you ask for, but considers what you may need to support more efficient processes and practices. The Quad Nova analyst team evaluates my requirements thoroughly and ask questions as they build. The system releases come to me well tested and ready for implementation which saves time and produces polished products. I have always been proud and excited to deliver these systems to my internal customers. ”

Aileen Gutwald | All Risks, Ltd.  
Training, Implementation & Support Manager