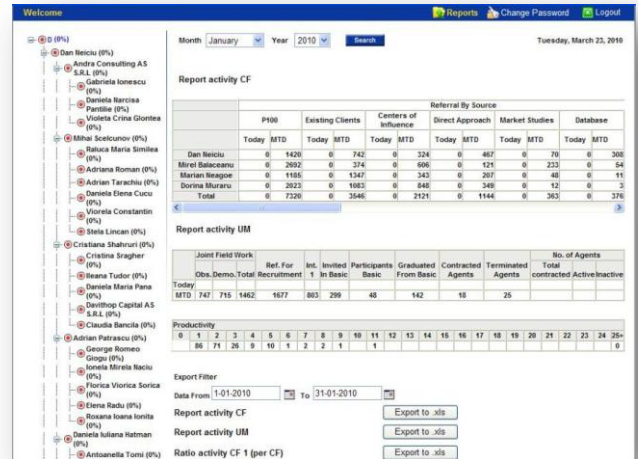# Activity Management System

ASP .Net & Crystal Reports Solutions for a Leading Romanian Insurance Provider

Executive Summary

When you are one of the largest insurance companies in the country, you have claims running into millions of pounds, you have employees who are scattered across throughout the country, and you have various levels in the same designation, and on top of it , multitudes of designations in the company and each level in each designation has hundreds of people, you need a system which not only tracks the information, the performance parameters of each of the people, but should also be robust, scalable, secure and user-friendly. When one of the largest insurance company in Romania faced this problem of consolidating all the information and making a system which catered to tracking correct information of its agents. The challenge lied in the timeframe available and also in understanding where to start so that the business for the company kept on running as usual without affecting the existing customers. The client was on the lookout for a mid sized vendor where it could share all the details without having to worry about the architecture of the application itself. They needed a web solution and were unsure whether the web version of such a massive application would be feasible, if at all.

About our Client

Client   *A Leading Insurance Firm* | **Location**   *Bucharest, Romania* | **Industry**   *Insurance Industry*

Business Situation

The client is Romania's one of the leading Insurance providers for Insurance as life insurance, retirement plan, medical insurance, fund management, child plan, child education plans. Because of the massive nature of the business of the client, the company employed a very large number of agents. Taking care of their referrals, history and linking it to their commission structure was becoming an overhead for the company. The large number of agents reported to a Unit manager who in turn reported to the Branch Manager. The Branch manager reported to the Regional Manager. The Director was reported to by all the regional managers. With this arrangement, the hierarchy made it very difficult for the Director to view the updates from the agents on a daily basis. It was getting impossible for the Unit manager to get together all the data and report it to the Director. It was then that the company decided to automate the process.

> We worked along with Mindfire since 2006 to a handful of application needed by our business, from commission applications to illustration software. Activity Management is a simple and great tool for us to follow each and every one of the activity KPIs of the entire sales force.
>
> I might add here that Kiran and his team provided a wonderful service to us and helped grew our business, creating unique tools.

Solution Details

The Mindfire Solution

Mindfire Solutions started on from listening to the exact needs of all the stakeholders at the start of the process. Each of the levels had dependency of data from the root level – the agents. All the data from the agents would not be displayed as is to all the levels of the organization structure. The level of detail was highest at the Unit Manager level and the level of segregation and assimilation was the highest at the Director level.

Activity management system is used to keep track of the managers' and agents' activities. It has two (admin / user) sections. An admin can create and update the agent information such as current status (active/terminated), reset password, assign override etc. Admin can synchronize the data from Access database to SQL Server database to update the agents. Mangers can enter the activities of their lower next hierarchy according to their role. Managers can also generate several reports (export to excel), graphs within a date range.

Technologies

Technologies used: ASP.NET, C#.NET, .Net 2.0 framework, Crystal Reports 10, JavaScript, SQL Server 2005, XML Chart

Final Results

Software System

Agent Code	First Name	Last Name	Agent Type	Branch	Current Status	Gender	
			BM		Terminated	Female	
10000	Mihaela	Mihailovici	UM	BU102	Terminated	Female	
10001	Luminita Cornelia	Bufanu	FT	BU224	Terminated	Female	
10002	Florin Francisc	Muller	UM	BU103	Terminated	Male	
10003	Luiza	Croitoru	FT	BU139	Terminated	Female	
10004	Gabriel Alexandru	Curiac	UM	BU105	Terminated	Male	
10005	Petru	Iuhasz-Pascan	BM	CT1	Terminated	Male	
10006	Axenia	Buiuca	UM	CT102	Terminated	Female	
10007	Despina	Chiriloaie	UM	CT103	Terminated	Female	
10008	Mihail-Gabriel	Horvath	FT	BU101	Terminated	Male	
10009	Marian Antoniu	Iordache	FT	BV105	Terminated	Male	
10010	Andreea	Morosanu	FT	BU108	Terminated	Female	
10011	Mariana	Gavriliu	FT	CJ123	Terminated	Female	
10012	Iulia	Racovitan	BM	CJ1	Terminated	Female	
10013	Cristian	Melin	UM	BH101	Terminated	Male	
10014	Alina	Perisoara	FT	BU115	Terminated	Female	
10015	Arthur	Hiripan	BM	TM1	Terminated	Male	
10016	Crina Ana	Craciun	FT	TM111	Terminated	Female	
10017	Traian Cristian	Moise	FT	BU104	Terminated	Male	

Figure 1 – Administrator Panel

Achievements

The biggest challenge in creating this Activity Management system was to create a system which handles enormous volume of data, maintains the sanctity of the backend calculations in the system as well as is highly optimized for performance because it was a web based application. In addition, all this had to be done maintaining highest level of data confidentiality and data security.

Mindfire not only achieved all of this but all created a system which is scalable and could helped create features for handling product portfolio changes of the customer.

Customer Benefits

- The specifications were more on the conceptual side. Mindfire provided product design support where basic requirements were understood and analyzed, workflow and features were brainstormed to come to the best possible design and implementation after elaborate discussions with the client. Communication and co-ordination with the client was the key to decision making on the feature details.
- Mindfire has excellent understanding of the business, architectural, operational, customer base specific considerations and requirements for various steps/versions of the complete system roadmap.
- Working with Mindfire, the client continues to benefit from excellent talent at Mindfire and reduced overall cost for the software product development along with growth in their business.

Future Relationship

Mindfire established a strong relationship with the client firm, having been involved in another project in evaluation system in same technology. Mindfire is already into development of the second version of the systems, which have many new features implemented.