



# CLIENT SPOTLIGHT Moody Insurance



**MOODY**  
INSURANCE AGENCY

Moody Insurance Boosts Efficiency and Productivity with a 3Cloud Custom Developed App

## CHALLENGE

Moody Insurance is dedicated to providing exceptional employee benefits packages to their corporate clients. Each year, they embark on the critical task of tailoring customized presentations for every customer, complete with the latest rates and insurance options from various providers.

However, this process has traditionally demanded a significant investment of time and effort from agents. Weeks and months are consumed manually collecting demographic data and inputting the multitude of provider rates. After gathering all pertinent information, agents pour hours into creating unique presentations for each individual client.

Recognizing the need for efficiency and productivity enhancement, Moody Insurance partnered with 3Cloud to create a proposal generator that would automate this process, saving their agents time.

## SOLUTION

The 3Cloud team engaged with Moody Insurance to simplify and streamline the entire process for their agents and brokers. We designed a suite of data entry screens, each with a specific purpose: one for collecting demographic information, another for inputting insurance carrier plan data, and another for entering pricing details.

To bring this vision to life, the team leveraged the cutting-edge technology stack of Vue 3 and JavaScript for the front-end, complemented by the robust capabilities of .NET 6 on the back-end, all seamlessly integrated with the reliability of Microsoft SQL Server for data management. This combination allowed us to create a powerful application that transforms insurance data into actionable insights, performing intricate calculations to provide critical information such as totals and year-to-year percentage changes.

↓ [SCROLL TO VIEW THE RESULTS](#)



## CLIENT SPOTLIGHT

# Moody Insurance

The proposal generation screen 3Cloud developed has a complex graphical user interface. Agents and brokers are empowered with an intuitive and visually engaging platform, with which they can effortlessly drag and drop insurance quotes onto a dynamic preview of the proposal, enabling real-time customization.

When the user is satisfied with the look of a proposal, a single click is all it takes to seamlessly convert the content from an HTML page into a Word document. This process enables agents and brokers to swiftly create professional proposals, which they can readily distribute to their valued customers.

### RESULTS

Thanks to the innovative proposal generator developed by 3Cloud for Moody Insurance, the business's agents and brokers now craft tailored proposals with remarkable efficiency, drastically reducing the time required compared to the previous process.

When clients request modifications or want to explore alternative options, the response is nearly instantaneous as agents can effortlessly generate new proposals to meet their clients' evolving needs.

This game-changing tool has impacted the business in multiple ways. Moody Insurance's agents can now allocate more valuable time toward advising and servicing their clients, and brokers benefit from the increased capacity to focus on sales, consequently driving revenue growth.

#### MOODY INSURANCE PROFILE

Insurance agency protecting businesses, employees and families in the Rocky Mountains.

**Annual Revenue:** \$26.6M

**Employees:** 259

**Innovation Focus:** App Innovation