



End-to-end agent portal revamp helps US insurer scale up; **13,000 agents onboarded** in under **3 weeks**



Aspire Systems has helped our team launch the redesigned Agent Portal in an astonishingly short period of time, and with continuous improvements ever since. While driving their own work, they worked collaboratively with other teams at our business to coordinate designs and dependencies, to ensure the successful launch and subsequent updates. We are now working (with Aspire Systems) to re-launch our Client Portal in the first half of this year.



**Head of Customer Service Technology,
US-based annuity and life insurer**



*attention.
always.*



Challenges

- Outdated portals & technology
- Agent hurdles
- High transaction times
- Complex navigation
- Inconsistent branding
- Legacy portal challenges
- Scalability issues

Solutions

- Portal restructuring
- New design, UI & UX implementation
- Responsive design adoption
- Development of single API layer
- Branding & theming overhaul
- Centralized IAM (identity and access management)
- Single data source system

About the Customer

Based in Iowa, our client is a financial services company specializing in creation and distribution of annuity and life insurance products through its subsidiaries. Their product portfolio encompasses a range of insurance and annuity offerings tailored for retirement income, including fixed and variable annuities, universal life insurance, and indexed universal life insurance. The company has established partnerships with more than 40,000 agents and advisors.

Challenges

While our client has maintained a strong and interactive online presence for quite a long period, recent advancements in the digital platform technology and evolving customer expectations have necessitated its modernization and expansion with focusing specifically on improving usability, ensuring mobile-friendly design, and meeting ADA standards. Furthermore, the evolution of digital platforms goes beyond traditional websites, requiring expertise across various domains—from UX design and content creation to development—to effectively deploy and sustain them.

Facing critical challenges with their existing infrastructure, our client manages a network of seven portals developed over a decade ago. Initially cutting-edge, these portals have since become outdated in terms of modern UI/UX standards. The inefficiencies in portal design and functionality not only hindered user experience but also led to cumbersome manual processes involving excessive paperwork. Agents navigating these portals faced significant obstacles, needing to access multiple interfaces for each analysis, resulting in prolonged transaction times. These aging portals presented numerous issues, including lack of upgrade support, escalating maintenance costs, and failure to meet the evolving needs of today's users.



Results

- 12,474 unique users migrated in 3 weeks
- 8,014 logged in <10 times
- 4,507 logged in >10 times
- >6,21,147 logins in 5 months
- Continuous real-time feedback
- Real-time analytics for improvement

Lack of standardization: Complex navigation and inefficient processes hindered a consistent digital self-service experience for both agents and customers.

Inconsistent branding: Discrepancies across touchpoints led to confusion and reduced coherence in the user journey.

Communication framework discrepancies: The absence of standardized written communication complicated agent-customer interactions, causing fragmented experiences and communication breakdowns

Legacy portal obstacles: Altering the legacy portals popped up scalability issues, integration complexities, non-responsive design, and reliance on outdated technology - Classic ASP.

Project highlights

The project kicked off in January 2023, with the first release seven months later, on August 25 that year. The team operated in 2-week sprints over 5 cycles, refining and developing 350 user stories. This structured approach ensured rapid progress and adaptability to evolving requirements.

Solutions

In response to the challenges posed by outdated portals, our client sought a transformative solution to enhance user experience and streamline operations. The proposed solution encompassed a holistic approach addressing various facets of portal development and design. Aspire was able to parachute in a cohesive team that brought this expertise to bear on behalf of our client, helping with everything from planning to design to execution.



- Portal restructuring
 - Design architecture enhancement
 - New design, UI & UX implementation
 - Branding & theming overhaul
 - Centralized IAM (identity and access management)
 - Single data source system
 - Responsive design adoption
 - Development of single API layer
 - Agile model approach
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Project 1st release – Agent Portal

The first release of the project was in August 2023. Our team embarked on a journey to create a new cloud-based architecture to address outdated portals, inefficient user experiences, and a lack of standardization. To achieve this transformation, Aspire's team of BA, Developers, solution architects, UI/UX designers implemented a MicroFrontend (MFE) development approach, allowing for modularity, scalability, and agility in the development process.

Features delivered

- **Agent enrolment & login:** Streamlined onboarding and login processes for agents.
- **Agent dashboard:** A comprehensive dashboard providing real-time insights about key internal metrics, customer metrics for agents.
- **Book of business:** Efficient management and tracking of agent portfolios.
- **Agent profile & training:** Personalized profiles and training modules for agents.



- **Suitability:** Ensured compliance and suitability of financial products.
 - **GA4 implementation:** Integrated Google Analytics 4 for enhanced analytics and tracking.
 - **Glance implementation:** Implemented Glance for improved customer interactions.
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Results

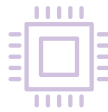
- 12,474 unique users migrated within 3 weeks of release
- Increased agents' satisfaction using new portal enhancements
 - Better UX with a new dashboard, filters, quick search, exports, sort etc.
 - Single sign-on enabled to reduce multiple logins to different applications
 - Enhanced navigation
 - Accessible on multiple devices – desktop/ mobiles/ tablets
 - Increased productivity by reducing transaction time
 - Improved application performance
- Received continuous real-time feedback from the user, based on which the enhancement was made.
- Visual representation of data to see the real-time performance and real-time analytics to identify the areas of improvement.
- 8,014 logged in 10 times or less while 4,507 logged in more than 10 times.
- Recorded more than 6,21,147 logins in last 5 months.



Continuing collaboration

This was our project with the client to improve their agent portal. We continue to work with the client for a similar revamp and enhancement of their customer portal.

Tech stack



- » **ReactJS**
- » **.NET**
- » **AWS**
- » **Google Analytics 4**



Aspire Systems is a global technology services firm serving as a trusted technology partner for our customers. We work with some of the world's most innovative enterprises and independent software vendors, helping them leverage technology and outsourcing in our specific areas of expertise. Our core philosophy of "Attention. Always." communicates our belief in lavishing care and attention on our customer and employees.

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