



# How We Cut Reporting Time by 95% for a Growing Insurance Business

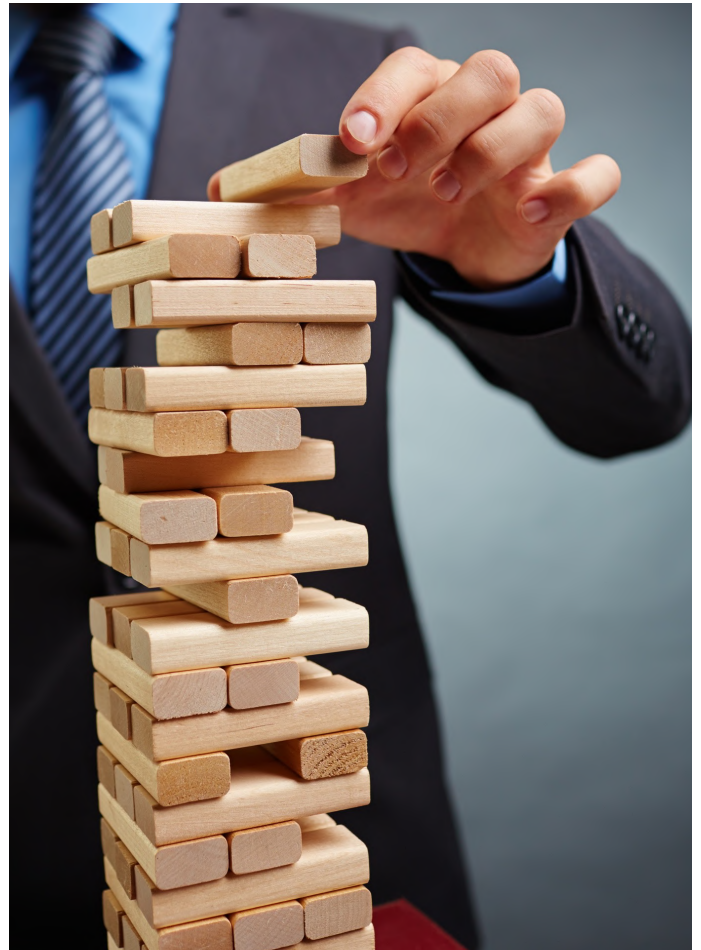


## Client Overview

A California-based insurance company headquartered in Laguna Hills, employing between 51 to 200 people were initially engaged with us for our Virtual Employee (VE) services and, over time, began exploring additional ways to optimize their internal operations. With a growing need to enhance their performance monitoring processes, they approached us to improve their reporting capabilities using Business Intelligence (BI).

Their leadership was eager to embrace a data-first mindset. However, their existing tools were holding them back. What began as a simple KPI reporting request quickly turned into a full-fledged BI transformation powered by Tableau, with the goal of making business insights not just accessible, but actionable.





## The Challenges

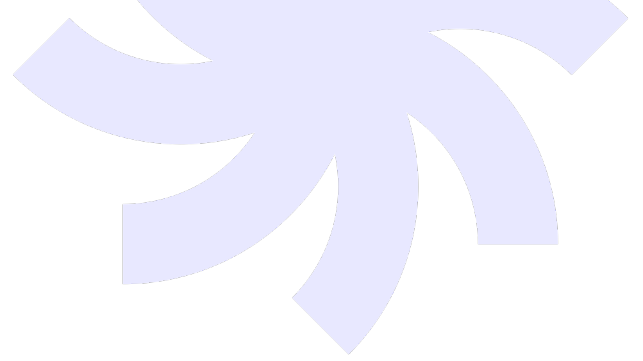
Like many mid-sized insurance firms, Suncoast relied heavily on Excel. But in this case, “heavily” was an understatement. Their reporting processes depended on bloated Excel files over 500MB in size, with more than 100,000 rows of data spread across multiple tabs. These spreadsheets powered three crucial reports: Claims, Quotes, and Policy Audits.

**The process for refreshing these reports was manual and exhausting. Employees had to:**

- Download raw reports from multiple systems
- Copy and paste data into predefined templates
- Drag formulas manually across hundreds of rows
- Refresh multiple pivot tables spread across tabs

This tedious process took more than one hour per report, leading to delayed decisions and a high risk of human error. Worse still, minor missteps like a misplaced formula could compromise the integrity of the entire report.

Beyond inefficiency, the situation posed operational risks. With growing data volume and increased report usage, the cracks were starting to show. The leadership needed a scalable, foolproof system that was faster, smarter, and immune to human inconsistencies.



## The Turning Point

The pivot happened during a routine conversation around VE services when our team introduced the client to our BI capabilities. The conversation quickly moved from performance support to performance transformation.

The client shared frustrations about the current system, and our SME stepped in to analyze their workflow. The opportunity to replace their manual Excel-based system with a fully automated Tableau dashboard became clear.

They weren't just looking for a vendor. They wanted a partner who could:

- Understand the logic buried in their Excel files
- Replicate it with pixel-perfect precision
- Make the experience seamless for non-technical users
- Deliver it fast, without disrupting day-to-day operations

What started as a peripheral discussion became the foundation for long-term strategic collaboration.



## Client's Vision

Suncoast's vision was simple but ambitious: get rid of Excel without sacrificing the comfort of Excel.

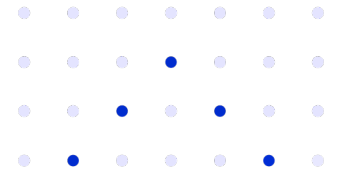
Their ideal solution was one where reports looked and felt like their familiar spreadsheets but required no manual work. They wanted drag-and-drop simplicity, where uploading a CSV would automatically update a dashboard with minimal effort.



The leadership also wanted:

- **Speed:** Refresh reports in minutes, not hours
- **Accuracy:** Eliminate formula mishaps and data inconsistencies
- **Adoption:** Ensure that team members could use the solution easily
- **Scalability:** Create a solution flexible enough to adapt as reporting needs evolved

And above all, they wanted to stop fighting with Excel and start making decisions faster.



# How We Revamped Their Operations

From the start, we took an agile and consultative approach. The revamp wasn't just about building dashboards; it was about understanding their logic, improving workflows, and designing with the end user in mind.

Here's how we brought it all to life:

## 1. Deep-Dive Discovery

We analyzed existing Excel files to uncover logic, calculations, formatting, filters, and data dependencies. We paid special attention to how pivot tables were used, what filters were most frequently applied, and how users interacted with the data.

## 2. Modular Dashboard Design

Instead of overwhelming the client with a complete overhaul all at once, we worked on one report at a time, starting with Claims. We created wireframes and prototypes in Tableau, mimicking the Excel tabular layout but enhancing it with drill-downs, slicers, and dynamic filters.

## 3. Drag-and-Drop Data Upload System

We set up a G Drive-powered automation process where the client could simply upload a new CSV file. The backend logic would then refresh the Tableau dashboard within 5 minutes, all without writing a single line of code or refreshing anything manually.

## 4. Feedback-Driven Iterations

Each version was reviewed by the client's team. From adjusting the color scheme to refining filters, their input shaped every iteration. This ensured we weren't just checking boxes; we were aligning the solution to how they think and work.

## 5. Tableau Cloud Deployment

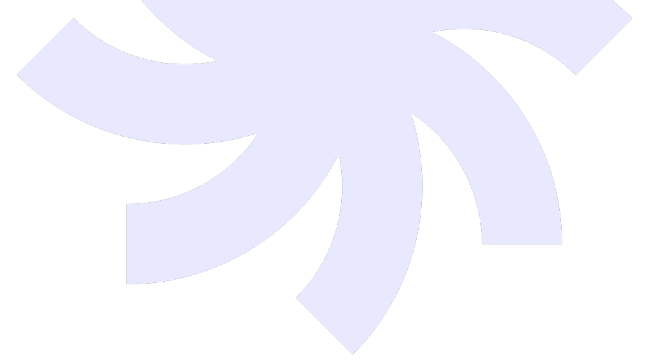
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# Measurable Impact

Within just a few weeks of go-live, the results were impossible to ignore. Here's how the transformation measured up:

Metric	Before	After
Report Refresh Time	1+ hour per report	<5 minutes
Manual Effort	High	Fully eliminated
Accuracy	Prone to formula and copy-paste errors	Consistent and reliable
Adoption Time	Slow, error-prone onboarding	Smooth onboarding with guided training
Data Integrity	Risky due to human errors	Improved via structured automation

**In short:** Suncoast went from clunky spreadsheets to business-ready dashboards that delivered insights with speed, accuracy, and clarity.



# The Transformative Impact of Our Solutions

Beyond performance metrics, the transformation had a broader cultural impact.

- \* **Leadership Confidence:** Leadership could now monitor KPIs in real-time without asking for manual reports. This gave them better visibility and control over day-to-day operations.
- \* **Team Empowerment:** Employees were no longer stuck fixing formulas or dragging rows. Instead, they could focus on interpretation and action, shifting the team's focus toward strategic decision-making.
- \* **Data-Driven Decisions:** With automated insights at their fingertips, the team could make quicker decisions backed by consistent data, improving turnaround times for key business activities.
- \* **Client Trust:** Our ability to deliver exactly what was needed without over-engineering the solution strengthened the relationship. What began as a side conversation turned into a trusted partnership for long-term digital transformation.

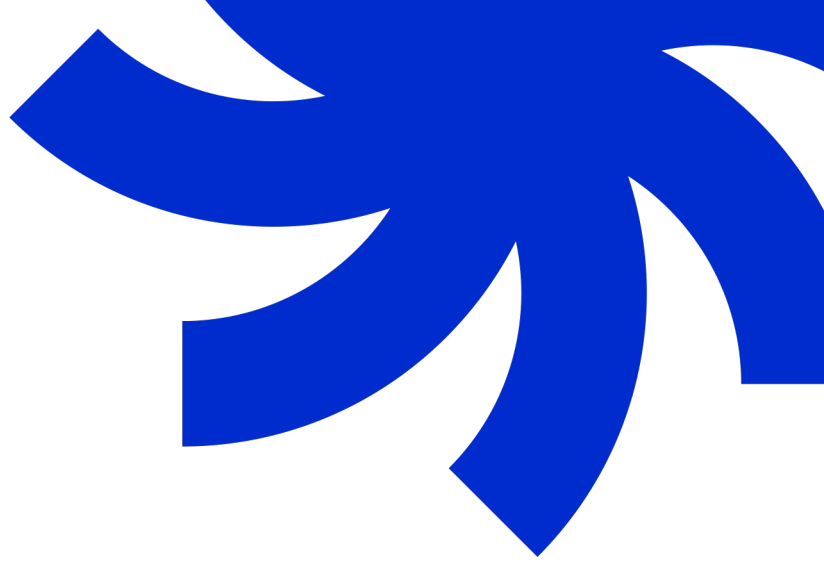


# Timeline of Transformation

Here's a quick snapshot of how the project evolved over time:

Phase	Timeframe	Key Activities
Discovery and Requirement Gathering	Week 1	Studied Excel logic, workflows, and reporting goals
Prototype Creation – Claims Report	Week 2	Created first Tableau draft, aligned layout with Excel
Feedback and Refinements	Week 3	Adjustments based on client preferences
Deployment of First Report	End of Week 3	Tableau Cloud rollout with GDrive integration
Remaining Dashboards (Quotes and Audit)	Week 4-5	Replicated and optimized
Training and Adoption Support	Week 6	Guided walk-throughs and hand-holding sessions
Stabilization and Project Wrap	Week 7	Final refinements and documentation delivered

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# We Are Available for You 24\*7

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# Thank You!

