

## Portfolio tool

Centralized repository for tracking portfolio benefit/blueprint changes over time

### Challenge

Our client has identified a large business need within the mid/large product and marketing teams for the centralized repository to track portfolio benefit and blueprint changes over time and automate input of this information into matrices, blueprints and cycle benefits collateral.

This information was not stored in one place and could only be found through reviewing email threads and multiple versions of Excel and MS Word documents. They were manually updated, one at a time, making it a very time consuming activity with great potential for user errors and omissions.

### Solution

Vicert produced a clearly defined architecture, including the database design and development plan for the solution.

Main features of the solution:

- Identifying and reporting on current benefits
- Identifying, tracking and reporting on changes to benefits, footnotes and other blueprint items
- Creating outputs that compare benefits across multiple plans and across multiple benefits within one plan
- Facilitating entering changes across multiple plans and creating new plans
- Integration with Microsoft Word and Excel to automatically produce various product and marketing outputs

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### Benefits

Increased efficiencies from the reduction of manual processes and less need for stakeholder review of the benefits and footnotes entered into the cycle collateral.

Eliminated the error prone process of maintaining email chains and various Excel and MS Word documents.

Improved accuracy of the output data. The accuracy of the matrices and blueprint output are critical since changes to the benefit information that they document communicate out to regulators, producers, employers and members, while at the same time define the rules for claim payments.

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**Tech:** .NET, IBM

**Duration:** 3 months

**Value:** \$100K