



Executive Summary

As the small business owner of Mary Hunt Agency, LLC, Mary Hunt is required to wear many hats in order to keep her clients happy and her company solvent. As a licensed insurance agent, Mary helps provide peace of mind to her customers by helping them find the best health insurance coverage for their needs. To help accomplish this goal, Mary employs a team of virtual assistants who assist with data management and processing quotations.

Managing the insurance quotation process within a customer relationship platform while protecting sensitive customer data can be a significant task. Mary turned to the software developers at Paperwork Pros to build a custom app to help connect her systems and improve overall organizational efficiency.

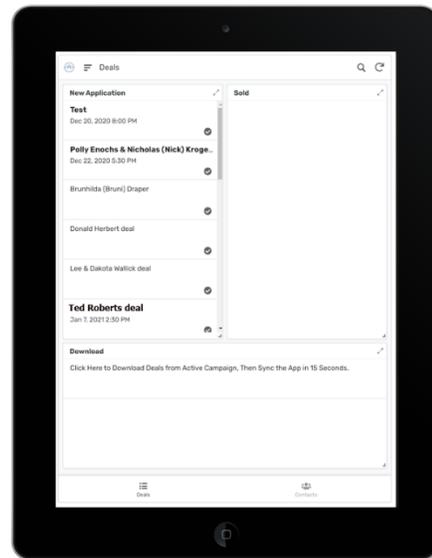
By leveraging the power of the Google AppSheet no-code development platform with industry leading online automation platform Integromat, Paperwork Pros was able to deliver a compelling, yet easy-to-use app for Mary and her team.

The Challenge

Driven by the seismic business changes brought on by the global pandemic, the company needed more efficient and automated process to improve business administration and efficiency. Since Mary and her team work remotely, they needed the capability to share information, while also keeping sensitive data secure and protected. Without a refined and consistent internal process, the company risked falling behind on their day-to-day tasks while placing an increasing time burden on Mary to manage everything.

The Solution

Mary worked with Paperwork Pros to develop a single application that would connect her CRM (Active Campaign) and customer database with her virtual employees while limiting their access to sensitive information. The application would also provide a fast and efficient way to update customer information, process applications and quotations, while plotting all of the companies current customers on a map.



The Process

Mark Hunt and Paperwork Pros conducted a series of project assessment Zoom calls to help identify challenges, problems, and issues that the application needed to solve. Based on feedback provided in their discussions, the team quickly identified Integromat as an essential tool to help address the data management issues the application needed to solve.

“Paperwork Pros created a beautiful app that helps me save time and improve accuracy.” said Mary Hunt. “They provided Integrity and quality - excellent work and great people! I’m grateful for Paperwork Pros’ expertise and the app created is terrific.”

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Mary Hunt

Throughout the application development process, there was a constant exchange of ideas and information between Mary and Paperwork Pros that allowed the team to solve some complex data management issues.

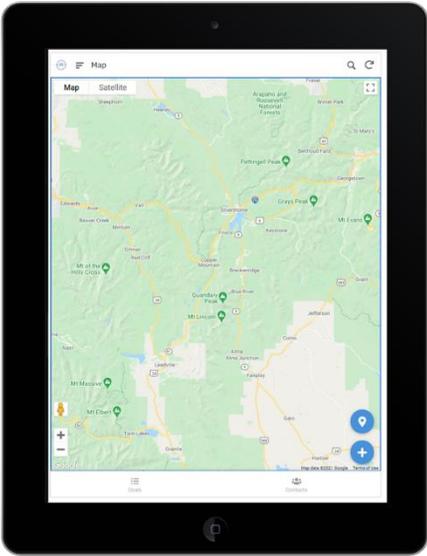
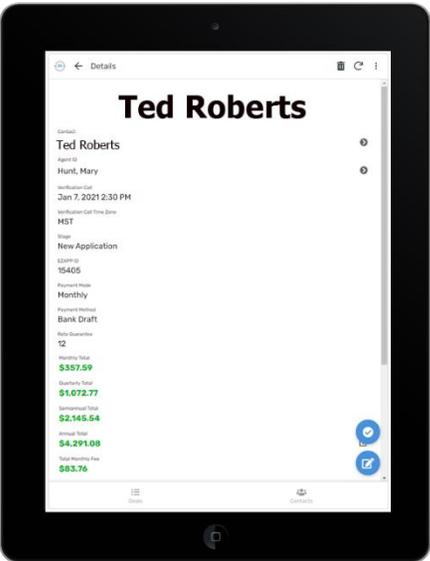
“We love working with our customers to help digitize their processes and enhance their business automation processes” said Paperwork Pros CEO, Ron Mouw. “Mary was a great partner to work with because she knows her business so well and had a clear vision on what she wanted to accomplish. We were able to leverage our collective strengths to create a winning application.”

The Result

Paperwork Pros combined the no-code software development platform Google AppSheet, which is part of Google Cloud, along with automation platform Integromat and customer relationship platform ActiveCampaign. The combination of these integrations helped augment the flexibility of the no-code application development process that Paperwork Pros delivered.

“Mary’s primary goals were to save time and improve accuracy” said Ron Mouw. “We also needed to find a way to connect and automate all of the components so that her team of virtual assistants could manage their work without accessing sensitive information.”

The final product provides a single place for Mary and her team to access and adjust information in a simple and intuitive framework. By utilizing best-in-class tools, the company’s business processes are safe, secure and always in sync.



Project Details

- The app allows Mary Hunt and her virtual team members to remotely access data in a simple and secure environment.
- The app shows a Google Map with the location of every customer. This helps Mary and the team manage their resources and enhance their service capabilities.
- Private customer data can be restricted and accessible only by Mary and her selected team members.
- The app automatically syncs with information within ActiveCampaign so customer quotations can be customized, tracked and managed throughout the lifecycle of the relationship.
- Team members can add individual tasks completed to each customer record to provide an on-going accounting on what's been done and what they are currently working on.
- The app automatically provides a two-way exchange of customer information that is upload and downloaded by Mary and her team.
- Utilizes AppSheet (Google App Sheet) per user licenses for the team members.

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