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Solutions for the Real World

Brown & Brown
Excel Replacement

Brown & Brown Insurance

Brown & Brown is an independent insurance intermediary that through its licensed subsidiaries provides a variety of insurance and reinsurance products and services to corporate, public entity, institutional, trade, professional, association and individual clients. Headquartered in Daytona Beach and Tampa, Florida, offices are located across the United States, with products and services offered through four major business divisions. We are listed on the NYSE at BRO.

Excel Replacement

Brown & Brown asked us to replace a time-consuming Excel data gathering process they repeat annually. Each of their locations throughout the country answer hundreds of questions in several different spreadsheets and email the completed surveys to one person who consolidates all of the surveys into a single Excel file.

	2013	% of revenue
C. 2013 Profit and Loss (P&L) - YTD Actual		
1. Core Revenue		
Agency Bill	\$0	0.00%
Direct Bill	\$0	0.00%
Incentive Commission	\$0	0.00%
Other Core Revenue	\$0	0.00%
Total 2013 Core Revenue	\$0	0.00%
2. Expenses		
Salary & Related Expense	\$0	0.00%
Operating Expenses	\$0	0.00%
Total 2013 Expenses	\$0	0.00%
Total 2013 P&L Operating Income	\$0	0.00%

As a replacement to this process, we implemented a web project where users can log in to complete the surveys and flag them as complete once they are satisfied with their entries. The administrator can quickly see the status of each location's surveys and follow up with locations that have not yet completed their surveys. Calculations such as totals and percentages are also done on the web page as they enter the data so the user can validate their entries.

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Orlando, FL
Bonds Commercial

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C. 2013 Profit and Loss (P&L) - YTD Actual		2013	% of revenue
1. Core Revenue			
Agency Bill		\$798,061	100.66%
Direct Bill		\$9,347	1.18%
Incentive Commission			0.00%
Other Core Revenue		\$-14,805	-1.84%
Total 2013 Core Revenue		\$792,803	100.00%
2. Expenses			
Salary & Related Expense		\$463,017	58.40%
Operating Expenses		\$113,838	14.33%
Total 2013 Expenses		\$576,855	72.74%
Total 2013 P&L Operating Income		\$216,148	27.26%

Save Section C

Once all locations complete their surveys, with a single click, the administrator creates the consolidated survey for each of the 200+ locations into a single Excel spreadsheet.

If an error is found, the location can be contacted to fix their data. Once complete, this consolidated file is created. Having all of the data in one place eliminates the confusion of which files are the most recent.

		2014	% of revenue	2014	% of revenue
A. General Information					
Profit Center Location/Profit		AFC		Orlando, FL	
Center #					
Department Leader		asdfasdf		james	
B. 2014 Profit and Loss (P&L) - Budget					
1 Core Revenue					
Agency Bill		\$12,555,555.55	6.48%	\$908,491	100.39%
Direct Bill		\$13,444,444.00	6.94%	\$9,177	1.01%
Incentive Commission		\$14,333,333.55	7.40%		0.00%
All Other Core Revenue		\$153,333,333.66	79.17%	\$-12,700	-1.40%
Total Budgeted 2014 Core Revenue		\$193,666,666.76	100.00%	\$904,968	100.00%
2 Expenses					
Salary & Related Expense		\$21.22	0.00%		50.91%
Operating Expenses		\$241,211,221.55	124.55%	\$117,025	12.93%
Total Budgeted 2014 Expenses		\$241,211,242.77	124.55%		63.84%
Total Budgeted 2014 P&L Operating Income		\$-47,544,576.01	-24.55%	\$327,215	36.16%

Business Value

With this new web site and process in place we were able to replace a month-long manual process where hundreds of spreadsheets were passed around by email, with possibility of files getting lost. This improved the accuracy of their data, workflow was easier and the time to create these spreadsheets now just take a matter of minutes.

Special Features

Using a key/value pairing between data name and value, we can easily define new templates as the surveys change from year to year.

Technology Used

Microsoft's Visual Studio

ASP.NET Web Forms

PDSA .NET Productivity Framework

Haystack Code Generator

C#

Microsoft SQL Server

jQuery (for calculating totals and percentages on the web page)

Microsoft's OpenXML SDK (to format the output spreadsheet)

Bootstrap CSS Template

Contact Information

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