DIGITIZING FIELD SALES & AGENT OVERSIGHT FOR MAGMA HDI INSURANCE

Countries we operate from

PROBLEM STATEMENT

Magma HDI faced widespread inefficiencies in managing and monitoring its distributed sales force:

Resource use is inconsistent, lacking real-time view.

Managers lack visibility, raising compliance risks.

Centralized tracking boosts accountability.

Reporting delays affect sales reviews.

INT.'S SOLUTION

INT. built a **dual-platform solution** — a **web portal and mobile application** — to streamline field sales planning, execution, and review.

- ✔ **Daily Planner:** Track meetings with check-in and check-out features.

- ✔ **Geo-tagged Visits:** Log your current location and travel easily with confidence.

- ✔ **Manager Dashboards:** Get insights on capacity, meeting summaries, and productivity.

- ✔ **Performance Engine:** Receive scores and metrics to improve assessments.

- ✔ **Audit Trail & Regulatory Compliance:** Present in every user flow experience
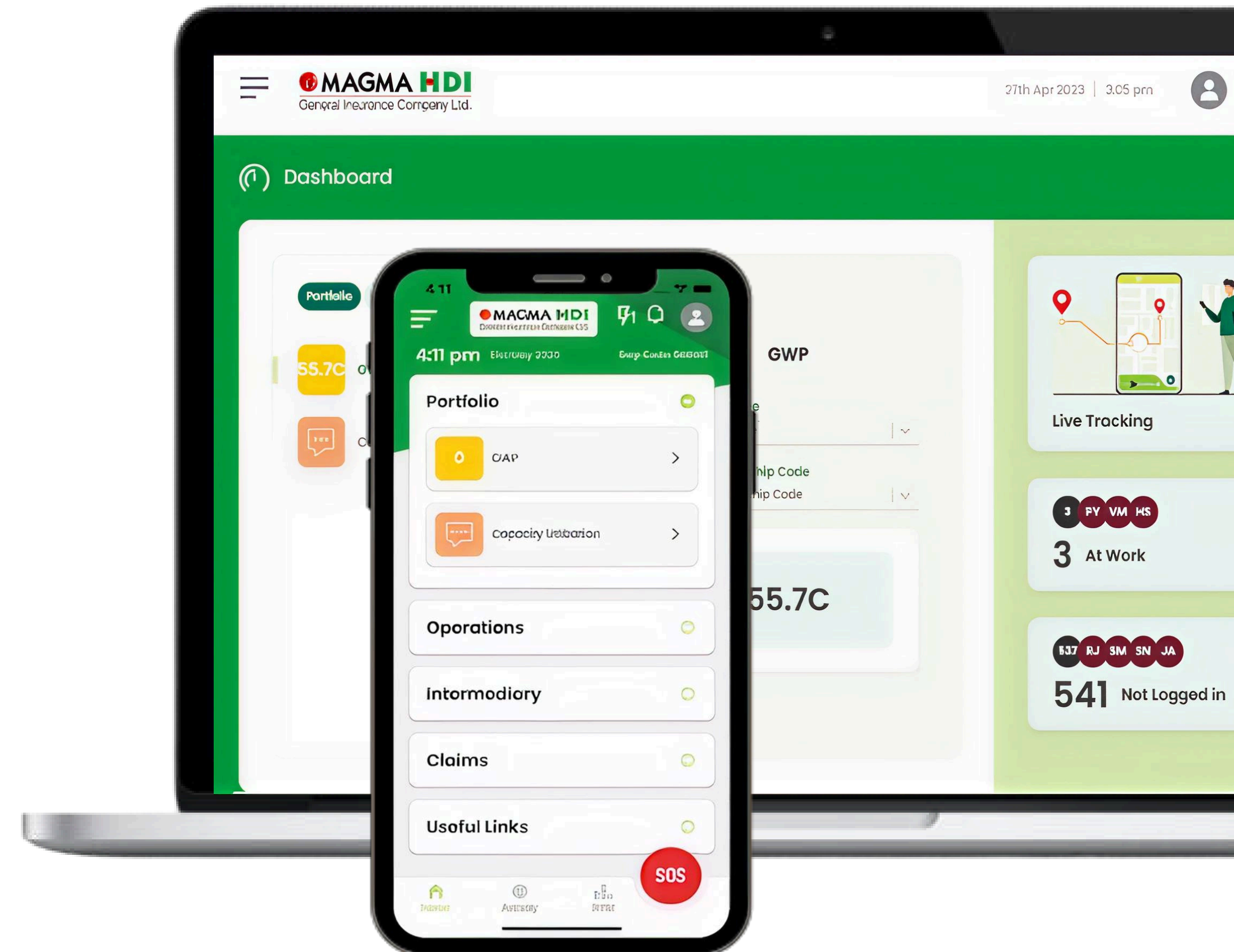
6-Step Applied Process

01

Field Research:
Mapped workflows and compliance gaps.

02

Centralized Tracking:
Built a platform for planning and reporting.

03

Monitoring Tools:
Integrated GPS tagging and visualizations.

04

Multi-Channel:
Deployed portal in React; mobile app in React Native.

05

Compliance Layer:
Embedded audit logs and accountability metrics.

06

Analytics Dashboards:
Enabled data-led performance reviews.

INT. | ● MAGMA HDI
General Insurance Company Ltd.

25%

increase in field meeting visibility and documentation

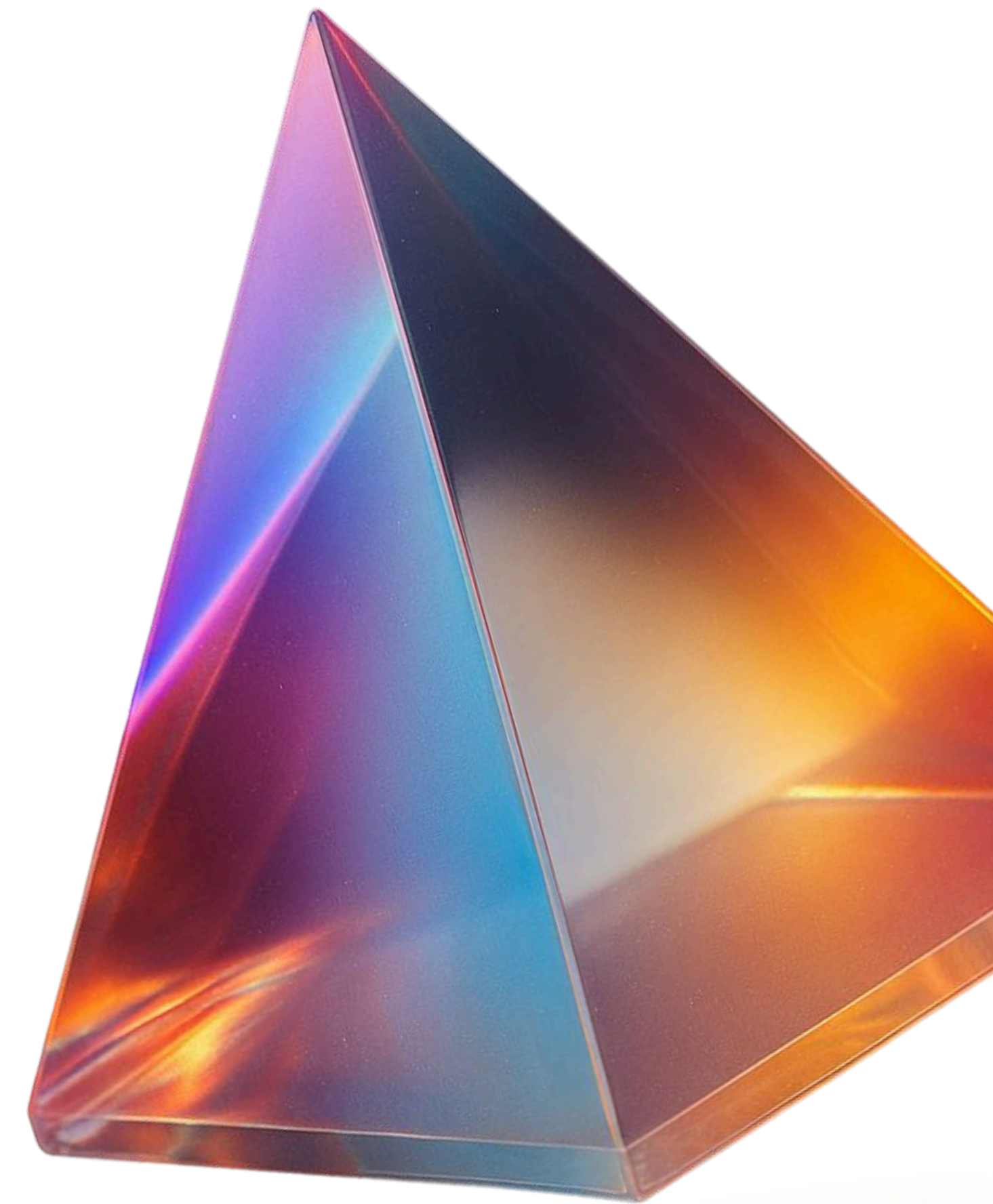**Enhanced accountability** through real-time dashboards and audit trails

3x

improvement in reporting turnaround with automated logs

Improved agent productivity via geo-tagged tracking and pre-scheduled routes

40%

drop in non-compliance instances related to sales visits

Greater resource optimization, reducing idle time across teams

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Let's Help You

Delight Your Customers
- The easiest way to achieve growth

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