



PolicyGenius chose Shortcut to improve the onboarding experience for new engineers

Industry
Finance

Company Size
500+

Location(s)
New York, NY



As a rising fintech startup, PolicyGenius is working to demystify the sometimes daunting process of purchasing life insurance. In order to keep up with their fast-growing team and customer base, PolicyGenius uses Shortcut to onboard new members and track processes quickly and effectively.

PolicyGenius Engineering Manager Kelly Wu is one such intrepid hero in this space, and we recently chatted with her about their unique approach to scaling up and staying on track. Read on for her tips and tricks for managing a growing team, onboarding, and more.

Outgrowing Old Tools

Before Shortcut, PolicyGenius was using a tool that started out fine, but didn't grow with their company. Engineering Manager Kelly Wu soon found that she was spending more time explaining their hacks for the tool to new hires, than getting them integrated into the team's processes and the company culture.

Their previous project management tool didn't have customizable stages for tasks, so they had to modify the existing framework to work with their workflow. And even with those tweaks, it still didn't *quite* work.

"Having to translate the inconsistencies between our process and the old project management tool when onboarding someone was one extra thing to do, on top of all the other onboarding work. This wasn't something we felt like should be part of the onboarding process. We needed a better tool."

Kelly Wu, PolicyGenius's Engineering Manager



Switching to Shortcut

Their CTO heard that other startups were using Shortcut and suggested they give it a try. The team was quickly drawn to the flexibility and lightweight interface, and became hooked after discovering how easy it was to start new projects.

One of their favorite features, aside from the overall ease of use, was the ability to set their own workflow.

Different functional groups are able to work together on the same Story board, by creating workspaces that provide different views and workflow states that match each team's needs. While Kelly rarely looks at work that is in "planning," "ready for design," or "in design," the product managers rely heavily on those views. This way, the same story can move through the various required steps, without having to be recreated over and over again when each group is done with it.

Using Shortcut has given PolicyGenius the flexibility they need, letting everyone customize their workflows and still get new members up to speed quickly.