

# Imperial Advisory Built an Online, Client-Facing PPP Loan Optimizer Tool Without Any Coding

### The Challenge

Imperial Advisory provides outsourced CFO services to companies and help businesses increase their profits while reducing their risk. They provide the CEO with better insight and analyses so that they can make better decisions.

Their team built a tool to help deal with Paycheck Protection Program (PPP) analytics and guide businesses in maximizing their chances of full loan forgiveness.

*“Usually our work is of more consultive in nature, but in this case, we built this tool to be a stand-alone product. We ultimately decided that it had broader applicability, and we were trying to figure out how to turn it into an online tool when we came upon SpreadsheetWeb.”* Says Gershon Morgulis, the founder and principal of Imperial Advisory.

Imperial Advisory created this optimizer in Excel because it's a software they are very familiar with, and it was a fitting choice for the breadth of this project.

Gershon describes their rationale as, *“When I worked in investment banking, we had something that someone spent four months trying to build, and then when they left the company, they spent a week and built the same thing in Excel and it was much better.*

*The cases where I would have built something like this in a much larger system are where you had to operate on data sets larger than you can fit in Excel, or hooking it up to other kinds of systems. But here, the intricate part was not a big data type of issue. The maximum number of employees in our system was 500, so not a particularly large data set.”*

They needed a solution that was easy to build with, played well with Excel, and could help them go live quickly.

### The Solution

Imperial Advisory was looking for a centralized solution with a professional look-and-feel. They looked into various solutions, from online spreadsheet programs, to custom coding the entire user interface and logic. None of these approaches proved to be effective in both keeping the costs down and presenting a professional look-and-feel.

*“We considered putting the tool online using Google Apps or Google Sheets and having certain parts of it hidden. We also considered putting it on SharePoint or some kind of online server. Our plan was to have some version of the spreadsheet, and the challenge was figuring out what the front-end would look like and how the user would interact with it.”* Says Gershon regarding their search for a solution.

*“The reason why we choose SpreadsheetWeb was because the interface looked cleaner. It didn't look like we just made a spreadsheet. From the perspective of the potential buyer, it appeared more like a tool and not like some spreadsheet which we would just give a copy of.*

*We don't have a paywall for the time being, but we can decide who gets access this way. It just looked and felt more professional, and in a certain way, easier to control.*

*If we put a spreadsheet online, and we got past the other hassles – in theory you could have multiple people in the spreadsheet at once. So, in practice, what we would have to do is to make separate spreadsheets for each person, which makes it more labor-intensive, clunky, and difficult to keep track of.*

*Now it's all in one centralized place. We can have 20, or potentially an unlimited number of people, without people seeing everybody else's data,”* further explains Gershon on why they chose SpreadsheetWEB.

## Case Study

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Using an Excel-based platform to deliver this web application meant that the Imperial Advisory team could utilize their Excel knowledge and did not have to hire a team of developers. SpreadsheetWEB ticked all the boxes, and proved to be the best solution for this project.

### The Results

With the help of the SpreadsheetWeb team, Imperial Advisory's PPP Optimizer tool became available to their end users in a matter of a few weeks. Given the urgency of publishing this tool, the timeliness with which the SpreadsheetWeb team completed this project, combined with the low costs associated with creating it, made it a success.

*"It's a much better presentation than our other options. Now that it's pretty much set up, it'll be easier to manage on the back-end on an ongoing basis. If we had to custom-code this tool and spend \$40,000 to do it, we wouldn't have done it. Instead, we paid the SpreadsheetWeb team \$2,000,"* says Gershon about the outcome of the project.

By converting their Excel workbook into a web application, Imperial Advisory can now ensure that all their clients are using the latest version of this tool, and their intellectual property is completely secure.

*"We wouldn't necessarily want to give a coder this whole thing because of the complexity of our tool. Trying to guide a coder through the complex back-end would have been a*

*laborious process, so we were happy that the SpreadsheetWeb team could simplify the process by working on the front-end and configuring the application without needing to edit the Excel sheet we developed on the back-end. And the SpreadsheetWeb team was responsive. When a problem did arise, the team was responsive in getting it fixed. If you have a big, complicated tool you need to get online, it's a great interface and their customer service is great. In general, I would recommend SpreadsheetWeb, even for a larger project."*

The Imperial Advisory team decided to use SpreadsheetWeb's public cloud, so they did not have to deal with setting up and maintaining a server. Their PPP Optimizer can now be accessed from a single location.

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