

CASE STUDY 2025

Closing legacy system gaps with a headless data and workflow engine

- Tier 1 carrier
- \$6.4B DWP
- Primary products: Term, WL, VUL, LTC, FA, FIA

SITUATION

A Tier 1 life & annuity carrier was struggling to modernize their agent and policyholder digital experiences due to challenges effectively extracting and resurfacing data updates across their supporting +24 backend systems. The biggest roadblock was their legacy admin system, Cyberlife, which housed 89% of the data needed. Despite its limitations, they were satisfied with its long-standing reliability and did not intend to rip and replace it. To better support the comprehensive data needs of their current and future digital experiences, they were seeking a solution to overcome the connectivity limitations of their legacy systems.



SUREIFY SOLUTION

CoreCONNECT, our data and workflow engine, was implemented to:

- Collect and normalize data from 850K policies, across +24 backend systems
- Distribute comprehensive, timely data to/from agent and policyholder portals
- Maintain consistent and accurate data across all digital experiences and backend systems
- Deliver transformed data to the enterprise warehouse for more advanced reporting and analytics
- Establish a chassis to accelerate the creation of future digital transactions
- Provide a data safeguard by caching complete data in the cloud

Cost Savings

\$2M

saved in the first 12 months sunsetting outdated systems

Operational Efficiency

100%

policyholder data consistency across +24 backend systems

Speed to Market

5 Weeks

POC build, 3 weeks ahead of schedule