



SITUATION

A reinsurer expanding into retail was seeking a competitive advantage beyond leading with commissions and rates. They decided to leverage their freedom from legacy system limitations to differentiate themselves with experiences that effectively enable customer self-service and empower agents to maintain and grow their book of business. A team of internal and external partners was being formed to collaborate in establishing their comprehensive suite of front and backend systems. As part of this process they identified a need for a solution to enable cross-system connectivity.

Speed-to-Market

19

digital transactions
Built in under
4 months

Connected Ecosystem

7

third-party systems
integrated to support data
& transactional workflows

Continued Advancement

2-3 weeks

AVG development for new digital transactions

CASE STUDY 2025

Launching a new brand with a best-in-class experience

- Reinsurer launching retail
- \$100B in AUM
- Primary product: MYGA, FIA

SUREIFY SOLUTION

CoreCONNECT (data and workflow engine), LifetimeSERVICE (policyholder portal), and LifetimeAGENT (agent portal) were utilized to:

- Elevate the agent and policyholder portal experience from strictly informational to actionable (i.e., beneficiary updates, indexed fund changes, withdrawals, quick quotes, etc.)
- Aggregate cross-system data and properly surface it within each digital experience
- Orchestrate transactional workflows across all operating systems (i.e., FAST, FireLight, etc.)
- Establish a foundation to support the continued development of digital transactions without additional headcount
- Quickly launch and scale new digital experiences via API