

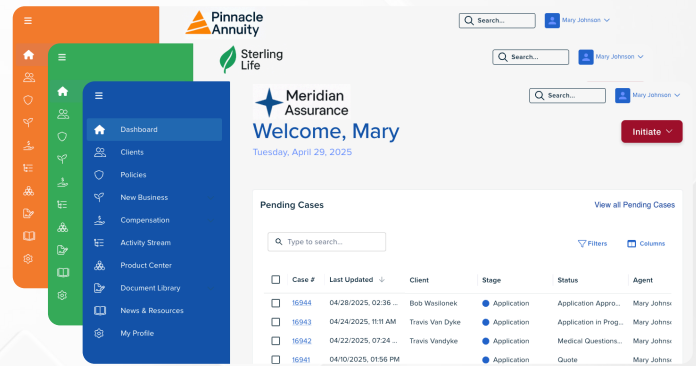
# CASE STUDY 2025

## Unifying data and digital experiences across multiple insurance brands

- Multi-brand holding company
- \$3.5B DWP
- Primary products: Annuities, FIA, WL, UL

## SITUATION

An insurance holding company was searching for a solution to more efficiently deliver agent and policyholder digital support across three brands. Their multi-portal configuration was delivering an inconsistent experience across brands and was cumbersome to maintain. Additionally, the siloed nature of the tech stack was creating monitoring blind spots. To elevate their digital experiences, the carrier needed a solution to connect backend systems across brands, as well as the systems leveraged by the TPA partner. Recognizing the complexity in effectively mapping the complex ecosystem, the carrier sought a partner who understood the nuances of life and annuity systems, and could deliver a connected digital experience across multiple brands.



## SUREIFY SOLUTION

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

- Deliver agents and policyholders a consistent, modern digital experience across brands
- Consolidate multiple agent portals and presales pages into one complete user experience
- Orchestrate data across the suite of backend and TPA systems
- Provide captive and multi-brand independent agents a single login for their entire book of business
- Ease system maintenance with centralized portals white labeled/co-labeled to align with brand

Increased Connectivity

**TPA**

data & workflow integration to portals

Enhanced Agent Experience

**SINGLE LOGIN**

unified data from three portals into one

Improved Monitoring

**360°**

view of all digital experiences