

Implementation of a workflow system for a *Fortune* 100 Insurance Company



Background

The client is a *Fortune* 100 insurance company. The client approached Trianz to implement an automated workflow system for management of their deals.



Challenges

- ▶ Manual data-handling processes to close deals
- ▶ Difficulty in finding documents resulting in rising payroll, hardware, and service costs to cope with the growing volume of information
- ▶ Decentralized document management



Business Execution Approach

- ▶ Examined current state of the workflow and developed future state plan and architecture
- ▶ Developed project implementation roadmap and designed content repository structure
- ▶ Implemented a Web-based data management solution based on Microsoft Office SharePoint Server 2010
- ▶ Implemented Office SharePoint Server 2010, Internet Security and Acceleration Server 2006, and Microsoft SQL Server 2005 Enterprise Edition data management software based solution
- ▶ Integrated solution with Microsoft Office Enterprise 2007 and Exchange Server 2003 Enterprise Edition



Successful Business Results

- ▶ Improved process turnaround time from days to hours
- ▶ Simplified management of document handling
- ▶ Real-time access to current and historical deal information for improved investment decisions
- ▶ Real-time access to loan information for efficient servicing
- ▶ Increased visibility throughout the deal acquisition and loan life cycle
- ▶ Centralized account reports with controls
- ▶ Online model for prepayment calculations
- ▶ Internet-based portal to access loan information

About Trianz

Trianz is a dynamic and fast growing firm that helps leaders in client organizations formulate and execute operational strategies to achieve business results from a senior management perspective. With a focus on Business Digitization, Analytics, Cloud Enterprise, Mobility and Cloud Infrastructure, we bring the best of consulting and technology experiences, execution models, and IP to deliver consistent success to clients. With offices in Silicon Valley, Washington DC Metro, New York, Bangalore, Chennai, Hyderabad, and the UAE, Trianz serves a wide range of clients from *Fortune* 1000 to emerging companies in high tech, insurance, financial services, retail, life sciences, public sector and logistics industries.