

## The Lifeline Program

### Overview

Country or Region: United States  
Industry: Insurance/Life Settlement

### Customer Profile

Founded in 1989

### Business Situation

The Lifeline was in need of an Information Technology strategic view into their operations and gain insight to immediate and future needs and planning.

### Solution

Innovative Architects delivered a strategic review after meeting with different sources within the company. Provide long-term outlook and plan to facilitate operations.

### Benefits

- Reusable process
- Relationship building across company
- Build trust within the Information Technology department
- Import Service Level Agreements

Gold Certified Microsoft  
Partner

Innovative Architects

*The Lifeline Program<sup>®</sup> is one of the most innovative, forward-thinking and highly respected life settlement providers in the market today. Since 1989, when The Lifeline pioneered the concept of buying and selling life insurance policies, the company has helped thousands of Americans find significant and substantial personal wealth and value through life settlements.*

*A true industry leader with vast experience and expertise, the company is among the handful of providers with its own captive equity capital. This means it can virtually guarantee its ability to easily and confidentially complete the purchase of a policy no matter the size, complexity or speed required. But perhaps what truly sets The Lifeline above and apart is its focus on its clients and their needs.*

*Through education and detail-oriented service, The Lifeline's true goal is to provide trusted advice and to treat older individuals with the dignity, respect and compassion they deserve.*



## For More Information

For more information about this Microsoft®

Solution, call the Innovative Architects Sales Information Center at 678.775.6851. To access information using the World Wide Web, go to: [www.InnovativeArchitects.com](http://www.InnovativeArchitects.com)

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## Situation

Lifeline was in need of completing a strategic review of their Information Technology department in a short period of time. The strategic review was to outline the current platforms being used to operate the business, such as software currently being utilized, infrastructure implemented, security assessment and overall IT policies and procedures.

Timing was critical as the company was facing a change in IT personnel and need to understand at a more detailed level potential risks within the environment as well as a long-term view into the direction of their Information Technology department.

## Solution

Our IA Microsoft consulting team, working directly with The Lifeline Program's Chief Financial Officer, produced a strategic view for the company to outline future short and long-term direction, opportunities and risk, governance processes and priority, and immediate needs assessment.

The overall approach was broken into two critical IT divisions:

- Process and Procedures: to address items such as governance and risk management, requirements gathering, software development, system and user acceptance testing, and SDLC management
- IT Operations: to address items such as infrastructure, help desk and support, security, network architecture, implementation and maintenance

The outcome was a strategic document that outlined in detail the current state of the environment, the risks associated (if any), and strategies for moving forward and recommendations on approaches.

The result of the strategic review and delivery resulted in an extended partnership with The Lifeline Company to facilitate the transition of their IT department to a new standard of operation.

## Benefits

Moving from a strategic view and into day-to-day operational based execution helped the company transition to a stronger relationship of the IT department to the rest of the business units. One that was built on trust and quick win execution to build success.

The IA Microsoft consulting team put in place a repeatable platform, from deployment to testing, requirements gathering to development implementation, and final production implementation.

Overall support to the organization increased with a more stable help desk process and data capturing, enabling the department to communicate service level agreements and success rates in a transparent mechanism.

Data integrity and technology consolidation reduce long-term expense and reporting capability. Standardized reporting led to increase understanding of company performance and operations.

IT governance processes were put in place to ensure the business had a transparent view into priorities and overall IT execution, increasing the business to IT relationship and understanding of IT projects. Projects were delivered on time, with communication along the way.

## Software and Services

Microsoft .NET

Microsoft SQL Server Reporting Services

Microsoft SQL Service Integration Services

Microsoft Office

Microsoft Windows Server System

Microsoft Office SharePoint Server

Microsoft Windows Server

Microsoft SQL Server

Microsoft .Net Framework

