



Case Study 1 — Enterprise Workflow Transformation (MetLife Annuities)

Client: MetLife (Annuities Division)

Industry: Financial Services

Services: Business analysis, workflow design, SDLC program management, QA & training

Timeline: 12 months (full SDLC)

The challenge

Paper-based annuity document routing caused long cycle times, compliance risk, and visibility gaps across teams.

What we did

- Led the **business requirements** program to move the division to an **Image & Workflow** platform (Oracle + VB, RAD delivery).
- Translated “as-is” processes into a clear “**to-be**” workflow with security, user management, status, and reporting.
- Drove **QA/UAT** with real business case scenarios; then built training curriculum and delivered roll-outs to users and managers.

Results

- **\$4M cost savings** from digitization and process streamlining.
- Faster, auditable workflow; improved compliance and stakeholder visibility.
- Users onboarded smoothly via targeted training and support.

Deliverables

- BRD & process maps, role-based security model, QA test cases, training manuals, go-live playbook.