

Commercial Insurance Provider's Journey to Comprehensive Data Governance

Company Profile

A leading commercial property and casualty insurance provider with over six decades of industry experience faced escalating challenges managing their enterprise data. This mid-sized insurer serves more than 15,000 policyholders across over 20 states and Washington, D.C., with commercial and contract surety coverage as well. The company's 1,000+ employees rely on numerous legacy and modern systems to support their daily operations.

The Challenge: Regulatory Compliance and Data Security

The insurance provider encountered multiple interrelated challenges affecting their data governance strategy:

Regulatory Pressures

The National Association of Insurance Regulators introduced stringent guidance requiring insurers to implement comprehensive data management practices, including robust data retention policies, enhanced security measures, irreversible data anonymization, and consumer privacy protections.

Our Services

The organization's data infrastructure presented numerous technical obstacles:

- **Fragmented data spread across multiple applications and systems**
- **Highly complex structured data requiring specialized handling**
- **Diverse technology stack including SAS, Oracle databases, AS/400, and PeopleSoft**
- **Limited data lineage visibility across the enterprise**
- **Growing data volume creating escalating security risks**

Previous Setbacks

A previous data management initiative using solutions from Iron Mountain and Micro-Focus had failed to meet the organization's requirements, creating urgency to find a reliable, proven alternative.

Risk Management Imperatives

The executive team recognized that their expanding data footprint created increasing:

- ↪ Regulatory compliance risks
- ↪ Data security vulnerabilities
- ↪ Operational inefficiencies
- ↪ Customer privacy concerns



The Solution: Comprehensive Data Governance Platform

After careful evaluation, the insurer selected Solix Technologies to implement a phased enterprise data management solution.

Strategic Approach

The implementation team adopted a methodical, risk-mitigating approach:

- ↪ Thorough requirements assessment across all affected systems
- ↪ End-to-end pilot program to validate solution effectiveness
- ↪ Phased rollout plan with defined success criteria
- ↪ Comprehensive testing at each implementation stage

Technical Solution Components

- ↪ Solix Common Data Platform as the core technology
- ↪ Oracle target database for structured data retention
- ↪ Deployment on Red Hat Enterprise Linux (RHEL)
- ↪ Integrated data discovery and masking capabilities
- ↪ Enterprise-wide application retirement and active archiving

Implementation Process

The project followed a structured implementation methodology:

Discovery Phase

The team conducted comprehensive data discovery across all affected systems, identifying critical data elements requiring special handling, establishing data lineage, and mapping regulatory requirements to specific data assets.

Pilot Implementation

A carefully scoped pilot deployment demonstrated the solution's capabilities, allowing the insurer to validate the approach before committing to full implementation. This phase included:

- ↪ Data extraction from source systems
- ↪ Transformation and normalization
- ↪ Application of masking policies
- ↪ Validation of data accessibility
- ↪ Verification of irreversible anonymization

Enterprise Rollout

Following pilot success, the solution was deployed enterprise-wide with:

- ↪ Consistent application of data governance policies
- ↪ Integration with existing security infrastructure
- ↪ Implementation of data retention schedules
- ↪ Comprehensive user training
- ↪ Validation of regulatory compliance

Business Outcomes

The Solix implementation delivered significant operational and strategic benefits:

Regulatory Compliance

- ↪ Full alignment with National Association of Insurance Regulators guidance
- ↪ Automated enforcement of data retention policies
- ↪ Verifiable data protection measures
- ↪ Enhanced audit capabilities

Data Security Enhancements

- ↪ Irreversible data masking for sensitive information
- ↪ Reduced attack surface through proper data retirement
- ↪ Improved visibility into data access and usage
- ↪ Centralized security policy management

Operational Improvements

- ↪ Streamlined access to historical data
- ↪ Reduced infrastructure costs through application retirement
- ↪ Simplified compliance reporting
- ↪ Enhanced data lifecycle management

Future Roadmap

Building on initial success, the insurer is now expanding their data governance strategy:

- ↪ Extending archiving to additional business units
- ↪ Implementing advanced analytics on properly anonymized data
- ↪ Enhancing automation of compliance processes
- ↪ Further optimizing infrastructure through application consolidation

Conclusion

Through partnership with Solix Technologies, this commercial insurer transformed their approach to data governance, addressing complex regulatory requirements while enhancing security and operational efficiency. The successful implementation demonstrates how mid-sized insurers can effectively navigate the complex intersection of data management, regulatory compliance, and security with the right technological approach.

Solix Technologies provides enterprise data management solutions that enable organizations to achieve regulatory compliance, enhance data security, and optimize operational efficiency.