



**Deloitte.**



# Lincoln Financial Provides Sales Teams with a Single Source of Truth on AWS

**Learn how Deloitte helped Lincoln Financial modernize and boost productivity with an agile solution on AWS.**

[Lincoln Financial Group](#) (Lincoln Financial) modernized its data environment to power its wholesale distribution organization with agile solutions from Amazon Web Services (AWS) and the help of [Deloitte](#). Founded in 1905, Lincoln Financial has evolved continually throughout its history to meet customer demands, and its legacy data warehouse was hindering its teams' ability to garner insights. Deloitte helped the company build a consolidated data and analytics solution, powered by a suite of AWS services. With near real-time access to data, Lincoln Financial's teams can offer tailored solutions with precision and confidence and unlock the productivity of its distribution force.

**BENEFITS**

**80%**  
reduction in user effort



**OPPORTUNITY** | Collaborating with Deloitte to Modernize and Build a Single Source of Truth

Over the past 119 years, Lincoln Financial has adapted its financial services solutions to meet the evolving needs of its partners and customers. This is particularly true when it comes to technology; the company has often shifted from outdated legacy systems to cohesive, modern solutions for better performance and efficiency. The decade-old data warehouse that powered Lincoln Financial's wholesale distribution organization was next on its road map. These legacy systems were difficult to enhance and maintain and did not provide a full view of the business required by distribution, sales, operations, and finance functions. Using AWS, the company completely modernized its data environment. And working alongside Deloitte, Lincoln Financial rebuilt its data foundation and established a single source of truth. This transformation streamlined data management, facilitated access to near real-time insights, and enhanced sales productivity.

Founded in 1905, Lincoln Financial provides financial protection and security solutions to empower more people to confidently succeed. The company sells its products through a third-party distribution model geared toward financial professionals and employer-sponsored plan managers. Its sales professionals relied on its legacy data warehouse to help analyze solution customer trends, forecast sales projections, and effectively drive data-driven marketing campaigns.

With an evolving financial landscape and changing customer expectations, the company recognized the need for a more robust, agile, and near real-time data solution. Its decade-old retail business data warehouses had become exceedingly cumbersome to maintain, requiring complex, multilayer load and transformation processes. In addition, these processes involved multiple cross-dependencies and lacked fault tolerance, which led to lengthy load times and missed service-level objectives. Data structures from various legacy mainframe systems had been propagated to the warehouse, requiring specialized knowledge to interpret the data. The operational complexity, difficulty of use, and limited insight steered Lincoln Financial to invest in its data assets and build a single source of truth.

Deloitte specializes in technology consulting and digital transformation services tailored to businesses' unique needs. When Lincoln Financial approached Deloitte for a solution, it was clear that transitioning to AWS was the optimal path forward. "Throughout the data modernization journey, Deloitte has provided a forward-looking approach," says Bob Mowery, vice president of data strategy and governance at Lincoln Financial. "The Deloitte team began with initial discovery sessions and then proposed a migration of our entire data environment to AWS."



## **SOLUTION** | Boosting Productivity and Enhancing Decision-Making on AWS

Together, Lincoln Financial and Deloitte embarked on a multiyear collaboration to create a data modernization solution on AWS. Throughout the project, Deloitte worked to address foundational issues, such as limited data access caused by a lack of integration, complexities and bottlenecks that hampered analysis, scalability constraints from on-premises systems, and a siloed, fragmented data landscape. The project's goals were to improve productivity and evaluate the digital experience for Lincoln Financial's distributors and wholesalers with reimagined data and insight driven experiences.

The teams implemented data systems and transformed the data infrastructure for Lincoln Financial's wholesale distribution network. Through this project, they built governed solutions that facilitated sales efficiency, improved the company's reinsurance margin, and unlocked financial reserves to improve its capital position. These unified, cloud-based data warehouses were built on top of several AWS services, including [Amazon Simple Storage Service](#) (Amazon S3)—an object storage service offering industry-leading scalability, data availability, security, and performance—and [Amazon Aurora](#), a relational database management system built for the cloud.

“Our data and analytics solutions, centered on insights and built on AWS, establish singular, trustworthy data sources, enhance reliability, and empower leadership decision-making across the organization,” says Aadil Lokhandwala, senior vice president of distribution strategic planning at Lincoln Financial.

By taking advantage of data insights, Lincoln Financial wholesalers can substantially increase their productivity. Users can consolidate data from various sources, including internal and external systems and files. Then, they can query and explore this data in near real time using tools and dashboards powered by AWS services such as [Amazon Athena](#), a serverless, interactive analytics service, and [AWS Glue](#), a serverless data integration service. With these insights, sales professionals can better understand customer preferences and tailor their offerings to meet their needs. This has led to an 80 percent reduction in user effort.



## **OUTCOME** | Staying Ahead of the Curve with Advanced Analytics Capabilities

On AWS, Lincoln Financial is furthering its mission to empower more people to confidently succeed in their own way. The delivery of high-quality data has resulted in improved speed to market, enhanced sales effectiveness, and efficient marketing. By equipping its sales teams with robust insights to drive their projects forward, Lincoln Financial can provide its customers with tailored solutions to help achieve their financial goals.

*“Using its extensive experience on AWS, Deloitte worked alongside us to bring our vision to life, from planning and establishing architecture to supplying technologies that help with development and testing,” says Lokhandwala. **“On the cloud, we can accomplish something that our customers have long wanted: providing an integrated, speed-to-market data and digital solution that can unlock automated insights and improve productivity.”***

[Learn more](#) about how Deloitte + AWS can transform your business.

### **AWS Services Used**

#### About Lincoln Financial Group

[Lincoln Financial Group](#) provides financial protection and security solutions to empower more people to confidently succeed in their own way. Founded in 1905, the company offers a wide range of products and services, from retirement planning tools to annuities, life insurance, and more.

#### About Deloitte

Deloitte provides industry-leading audit, consulting, tax and advisory services to many of the world's most admired brands, including nearly 90% of the Fortune 500® and more than 8,500 U.S.-based private companies. At Deloitte, we strive to live our purpose of making an [impact that matters](#) by creating trust and confidence in a more equitable society. We leverage our unique blend of business acumen, command of technology, and strategic technology alliances to advise our clients across industries as they [build their future](#). Deloitte is proud to be part of the largest global professional services network serving our clients in the markets that are most important to them. Bringing more than 175 years of service, our network of member firms spans more than 150 countries and territories. Learn how Deloitte's approximately 457,000 people worldwide connect for impact at [www.deloitte.com](http://www.deloitte.com).