**M Joseph Mapleton**

**mapletonjoseph@gmail.com**

**(872) 877-3494**

**PROFESSIONAL SUMMARY:**

* As a Senior Business Analyst with 8 years of experience in Business Analysis in Insurance with Property & Casualty, Life Insurance, Annuities,
* Proficient in Business Requirements Gathering, Business Process Flow, Analyzing and documenting Business Requirements, Functional Specifications, Business Process Mapping, Quality Assurance skills, Data analysis, Data warehousing, Data Mapping, Business Requirement elicitation techniques.
* Experienced in developing Conceptual, logical models and physical database design for Online Transactional processing (OLTP) and Online Analytical Processing (OLAP) systems.
* Extensive life insurance and annuity experience with Traditional Life, Pre - tax and post-tax annuities, etc.
* Expertise in requirements gathering, documentation, planning and change management.
* Excellent knowledge of life insurance policy administration (Life Comm, Cyber Life, LifePRO) processes and procedures from new business through claims.
* Experienced with a lifetime or short-term annuity transformation from one insurance company to another.
* Knowledge on Vantage System and Group Life Insurance - New Business, Claim processing, Processing of accident Insurance Claims, Admin processing and client correspondence.
* Experienced in analyzing the key data fields from the existing systems and how they relate to the required conversion data fields on the Vantage-One System.
* Experience in all phases of Software Development Life Cycle (SDLC) including initiation phase, planning, design, development, integration, testing and maintenance.
* Experience with Term Life, Whole Life, Interest-Sensitive Whole Life, Term Insurance, Universal Life, Indexed Universal Life, Variable Life, Fixed Annuities, Indexed Annuities and Variable Annuities.
* Extensive experience in business Analysis modelling, business requirements gathering, database design and development of Web Based, and Client/Server applications.
* Solid knowledge of Group Life Insurance, B2B, Personal & Commercial Insurance, Pension & Retirement applications and products with emphasis on new business and policy administration systems.
* Working experience on different types of retirement plans that includes 401k, 403 and defined contribution plans.
* Exposure to ACORD Property and Casualty Standards and ISO (Insurance Services Office) tools and conventions.
* Good knowledge on Professional Liability, Benefit Lines and other Property and Casualty products and other related health care entities.
* Expert in the Annuities, Disability, and Supplemental Insurance policies include administration, sales, customization, claims, pensions and CMS.
* Experienced in developing the project supporting modifications to the Vantage-One Annuity System.
* Knowledge of USA Property & Casualty Insurance Market, Life insurance market, Large Account Risk Pricing Tools, Business reporting (both Facultative and Treaty), Ceded - Assumed, Retro Business, Insurance Accounting, CAT Bonds, ART (Alternative Risk Transfer) Tools.
* Experience with Subject matter expertise (SME) assistance with life insurance and annuity products.
* Domain knowledge of insurance industry with very challenging and demanding work environment. Broad knowledge in Property and Casualty Insurance including Auto, Home, and Marine Life insurance/Annuities.
* Knowledge on Annuity products for new business, Underwriting, Accounting and Admin processing.
* Experience in working with Subject Matter experts and carefully recording the Business requirements in Agile methodology.
* Strong experience in RUP Business Modelling process and expertise in UML (class diagrams, object diagrams, GAP Analysis, use case diagrams, state diagrams, sequence diagrams, activity diagrams, and collaboration diagrams) as a business analysis methodology for application functionality designs using IBM's Rational Rose.
* Worked with Rational Suite of tools to create requirements documents (Requisite Pro), visual data models (Rose), manage and track defects (Clear Quest).
* Organized many Joint Application Developments (JAD) sessions and Joint Requirement Planning sessions (JRP), walkthrough, Interviews, Workshops and Rapid Application Development (RAD) sessions with end-user/clients/stake holders and the IT group.
* Strong experience in conducting User Acceptance Testing (UAT) and documentation of Test Cases. Expertise in designing and developing Test Plans and Test Scripts.
* Review of various documents including the Software Requirement Specifications (SRS), Business requirements document (BRD), Use Case Specifications, Functional Specifications (FSD), Systems Design Specification (SDS), Requirement Traceability Matrix (RTM) and testing documents
* Expertise in preparing Test Strategy, Test Plan, Test Summary Reports, Test Cases and Test Scripts for Automated and manual testing.

**EDUCATION**:

* Bachelors in Commerce, Pakistan - 2014.

**PROFESSIONAL EXPERIENCE:**

**John Hancock Financial - Boston, MA (Remote) January 2022 - Present**

**Sr. Business Analyst**

**Responsibilities:**

* Responsible for the analysis of the Vantage-One Accounting sub-system to help resolve out of balance issues with the reporting of general ledger.
* Performing production support, identifying processing issues and assisting the business areas with outstanding issues with group annuities, individual annuities, defined contributions and group pension policies.
* Responsibility included modifications to a customer’s mainframe Vantage system to support new product features or regulatory requirements and, in some cases, involved a system upgrade.
* Responsible for gathering requirements from users in operations group and performing data mapping for the application, confirm and vacillating the requirement at time of BA testing.
* Analyze available source data LifePRO, PALM, FDP, etc. Map to the new platforms data structure and requirements. Define data transformation rules for conversion.
* Created test plans and project timelines coordinated with testers to ensure that expected results were attained for LifePRO system enhancements and modifications.
* Worked with other interface departments which are connected with LifePRO.
* Analyze annuities’ accumulation and payout cycles: cash flows, terminations, selections, and utilizations
* Coordinating with admin systems for Life Insurance, Long term Care, Health and Annuities.
* Analyze New life and annuity products feasibility and profitability analysis and review.
* Worked on existing life and annuity products enhancements and restructure.
* Performed Business analysis and design for required modifications to the Vantage-One Annuity System.
* Executed test scripts in Vantage One system for integration project.
* Involved with the technical team in understanding the XML file format required for Split loss and Policy process.
* Modifying business rules, coverage/deductibles, quotes, rate files, policy forms, endorsements, and Retirement services (products included Defined contribution plans, Defined benefits plans, Variable annuity plans, and Plan performance memorandums).
* Participated in integrating Prudential's purchase of all states Variable Annuity business. This effort entailed interviewing technical and senior management staff.
* Serve as Insurance SME, reporting to the President, addressing various Insurance industry issues as they arise and the point person for the development and adoption of the ACORD xml standards.
* Worked on Conversion of Life and Annuity Products to the ALIP administration system. Supported post-implementation system conversion problems related to pending suspense items.
* Responsible for gathering requirements for conversion and integration efforts.
* Manage a number of enterprise and strategic projects including a conversion effort supporting the compensation system involving the conversion of life business from one administration system to another.
* Involved in generating XML documents using the XML Output Stage.
* Performed data load process using XML Style sheets and ACORD.
* Map actuarial concepts (annuities valuation, reserving,) to data model structures: identification of existing, or creation of new business terms their descriptions and sourcing.
* Analyze annuities’ accumulation and payout lifecycles: cash flows, terminations, selections, and utilizations
* Coordinating with admin systems for Life Insurance, Long term Care, Health and Annuities.
* Co-ordinated with onshore teams and client for requirements clarification.
* Documented the requirements and continuously update/modify these documents as and when required.
* Get the documents signed-off from the client business team.
* Worked with quality control teams to develop Test Plans, Test Cases and test scripts based on functional performance criteria and usability.
* Identify source systems, and designate data points files for annuities modeling and experience studies efforts.
* Implemented Software Quality Assurance development policies and test procedures. Documented test scripts according to the business specifications and design documents.
* Interacting with the Development/Testing team to impart knowledge about client requirements.
* Acted as one point of contact for client business analysts, business users and offshore team throughout development/testing phase.

**Thrivent - Minneapolis, MN June 2020 - December 2021**

**Business Analyst**

**Roles & Responsibilities:**

* Performed the role of a primary Intermediary between the Subject Matter Experts, business user and technical SMEs to identify the business needs, Business Rules, Business Processes & Interface Specifications for the New Claim module and Claims Assignment Module.
* Performed data mapping: Expertly analyzed data sets for different auto insurance policies like liability coverage, personal injury protection and uninsured motorist protection coverage.
* Responsible for converting for Mutual Life Insurance, the Fixed and Variable Annuities PC administrative system to the mainframe Vantage.
* Worked in Simplified Accounts opening project that used E-forms that the financial advisors use to open Brokerage, Annuity, Insurance and other securities accounts automatically and then submit them electronically.
* Translated business requirements into functional specifications for communication to technical team throughout various releases of the project.
* Evaluated administration systems for feasibility and appropriateness in the current environment, Cyberlife, Vantage, LifePRO.
* Involved with Quality Assurance Test team researched and analyzed policies on LifePRO policy administration system to detect and resolve defects.
* Involved in testing validity and integrity of the calculation engines for Deferred Annuities, Past Services Pension adjustments
* Managed the output requirement project for various Life insurance products.
* Created XML block additions and modifications based on business rules and workflow modifications to capture and manage client policy and underwriting data required to issue policy for a prospective insured.
* Form the requirements and using technologies such as JavaScript, XML, LDAP, AML language (like XML), and TIBCO configure and provide custom enhancements to the client.
* Converted a Life product from Cybertek to Sungard/FDP Administration System, which included conversion data and data mapping validation.
* Analyzed the key data fields from the existing systems and how they relate to the required conversion data fields on the Vantage-One System.
* Participated in a successful new product development project supporting modifications to the Vantage-One Annuity System.
* Involved in a more detailed data mapping effort to determine which required data fields from the existing systems were necessary for the Vantage-One conversion.
* Involved in Case designs for life, annuity, disability and long-term care insurance
* Involved annuity performance data process.
* Responsible for converting for Mutual Life Insurance, the Fixed and Variable Annuities PC administrative system to the mainframe Vantage.
* Provide Business Analysis Support including requirements elicitation, business specifications, created test plan, scripts and complex integration test plan for an annuity new business system on the administration system. Conducted system, integration and regression testing.
* Documented Policy integration and claims professional assignment details in Vision and Business Requirement Documents (BRDs), Functional Requirement Documents (FRDs) using Rational Requisite Pro and Power Designer.
* Performed GAP analysis on the traditional claims system and newly integrated ClaimCenter and carefully elaborated application enhancement specifications detailing in scope/out of scope items, as-is/to-be process maps and critical test scenarios.
* Systematized and Executed UI/GUI Testing, Progression, Regression testing and provided support for User Acceptance Testing (UAT) for multiple iterations involving the entire Policy Holder environment setup.
* Garnered technical prowess on Change Management by performing Impact Analysis for Change Requests obtained during Claim’s processing lifecycle.
* Collaborated with development and testing teams to accomplish timely release objectives.
* Participated in preparing training material for agents and policy holders and created thorough documents.

**Guardian Corp. (GIS), Bethlehem, PA January 2018 – May 2019**

**Business Analyst**

**Roles & Responsibilities:**

* Met with business partners to gather requirements, created Visio system workflows, developed detailed business and technical specifications, evaluated options and risks and recommended best possible solution based on business benefits and needs to convert.
* Provided solutions to generate product trend analysis reports, customer behavior pattern and Claim history reports and assisted Legal-compliance, actuaries, product development and management teams in decision analysis.
* Used external data sources to feed in product systems catering to Brokerage, Mutual Funds and Annuities
* Collaborated on a team to perform due diligence and conduct valuation analysis on vendor's systems to replace a legacy system for annuity administration.
* Constructed Screen Mockups/Definitions and Dependencies for annuities portfolios.
* Gathered all applications used by users across all Business Units like Claims, Consumer, Underwriting, Specialty Lines, PCG (Private Client Group), and Travel Guard.
* Implement modifications to Vantage-One to support business processing rules.
* Analyze current calculations used by Vantage-One for product administration.
* Align Vantage calculations and processing to meet business requirements.
* Create Business Requirement Documents (BRD), Technical and Design specifications document (TSD), Report Specification Document (RSD) and Solution Design Document to provide detailed information about the application, data and processes being retired, archived or integrated.
* Performed Requirement reviews with SME's, Business Functional Owners and Data Modelers.
* Performed extensive requirement analysis including Data analysis and Gap analysis.
* Utilized Agile Methodology to configure and develop process, standards and procedures.
* Performed GAP analysis to compare the existing system with the proposed system and documented new requirements and features.
* Worked with cross-functional ClaimCenter team to be sure that LOB is in sync with PolicyCenter as configuration continues
* Defined business rules for account and agent set-up within PC and integration requirements for downstream applications including BillingCenter.
* Defined Functional Test Cases, documented, Executed test scripts
* Had a good work in JAD sessions, which helped synchronize the different stakeholders on their objectives and helped the developers to have a clear picture of the project.
* Conducted presentations of the Q/A test results with analysis to the stakeholders and users and documented modifications and requirements.
* Coordinated QA activities across Functional QA and Performance QA teams
* Assigned tasks among development team, monitored and tracked progress of project following agile methodology.
* Wrote Test Cases and performed User Acceptance Testing, documented the in-detail defects using the Defect Tracking report.
* Created Use cases, activity report, logical components and deployment views to extract business process flows and workflows involved in the project. Carried out defect tracking using Clear Quest.
* Used Test Case distribution and development reports to track the progress of test case planning, implementation and execution results

**Principal Financial - Des Moines, IA September 2017 – December 2018**

**Business Analyst**

**Responsibilities:**

* Conducted Functional Walkthroughs, User Acceptance Testing (UAT), and supervised the development of User Manuals for customers.
* Worked with the account managers, managements, and report requestors to gather requirements, get report requests.
* Participated in meetings and work sessions to gain thorough understanding of the Annuity business, its products and services, offering defined benefits
* Collected and documented the requirement of Business Teams from Annuities at Prudential &amp; ASPF, Policy & Program Evaluation Team, and Project Sponsors & Actuaries.
* Worked with annuity and insurance business partners to support the drafting and management of annuity point of sale forms.
* Wrote Business Requirements, analyzed them and tested them.
* Owned the entire reporting process. Interacted with the ETL team, developer(s), management, and account holders to get the requirements, document them, design templates, and write specifications.
* Worked with user story to respond faster and with less overhead to rapidly changing real-world requirements in an Agile environment
* Conducted RAD sessions for the report users, requestors, and the developers.
* Created and managed project templates, Use Case project templates, requirement types and traceability relationships in Requisite Pro.
* Prepared Need Analysis Documents of the requirements gathered through JAD sessions.
* Wrote Test Cases in Mercury Quality center that would test various Test scenarios.
* Wrote Test plan and Test cases for the Integration testing and system testing.
* Tracked the defects in legacy reports as per account managers and end users. Compared the results and tracked the differences in excel
* Involved in creating Process Flow diagrams, Use Case Diagrams, Class Diagrams and Interaction Diagrams using Microsoft Visio and Rational BPM.
* Worked with QA team and Performed Unit Testing and User Acceptance Testing and documented detailed defects.
* Worked extensively with the QA team for designing Test Plan and Test Cases for the User Acceptance Testing (UAT).
* Involved in documenting the UAT test plan and executing test cases with Users to ensure user acceptance.
* Helped with Data Mapping between the data mart and the Source Systems.
* Worked as a liaison between the Business and Technology Department.

**New York Life - New York, NY July 2016 – August 2017**

**Business Analyst**

**Responsibilities:**

* Responsible for the configuration of rates and rating algorithm in Personal Automobile and Home insurance products rating engine.
* Involved in coordinating with the database design team, using SQL to Query databases and providing inputs in finalizing the data model, report layouts.
* Worked on the systems implementation project management plan with milestones and steps from procurement of vendors to project implementation and maintenance.
* Communicated with insurance brokers to obtain information necessary for processing claims.
* Involved in analysis of Department of Insurance filings and prepared documentation on the impact on rating.
* Analyze the functional requirements, writing test cases for each object. Using test specs and test frames created, automated the test cases using Test Director.
* Worked closely with Customer Portfolio, Forms team to test the integration between these services.
* Prepared all SDLC documents for projects.
* Worked closely with Regulatory and Filings (RAF), product teams in various insurance operations like Premium Survey, Rating Examples and Market conducts.
* Authored progress and completion reports, which were then submitted to project management on a weekly basis.
* Collaborated with the development team to monitor and track progress of project following Agile methodology.
* Collaborated with various teams during the user acceptance testing (UAT) of the final product.
* Reviewed different comprehensive data reports using MS Access and MS Excel.

**All State Insurance - North Hills, CA May 2015 – June 2016**

**Business Analyst**

**Responsibilities:**

* Created relationships in Requirement Traceability Matrix linking Business Requirements to Functional requirements and Functional Requirements to Systems Requirements.
* Performing application support monitoring system interfaces, generating reports, researching data issues, documenting support requests
* Gathering requirements for a data collection and reporting system
* Researching various topics, scheduling meetings and documenting meeting minutes.
* Analyze patient accounts and clarify any information needed to correctly answer patient's questions regarding their account.
* Have been part of the team analyzing and testing the user interface and constantly redesigning the system to increase its user friendliness for the clients.
* Involved in different Testing phases.
* Performing business process support reviewing user questions, making data updates, providing one-on-one user training, identifying process improvements
* Managed multiple Patients Accounts across various platforms.
* Provided good customer service to the patients by proving answers to their question in a timely and courteous manner.