

TCBAF

Getting Started with Business Architecture

Nicole Carlson, Manager, Internal Consulting

Desiree Manning, Senior Corporate Actuarial Initiatives Manager

Nina Munson, Digital Service & ECPI Program Manager



Nicole Carlson

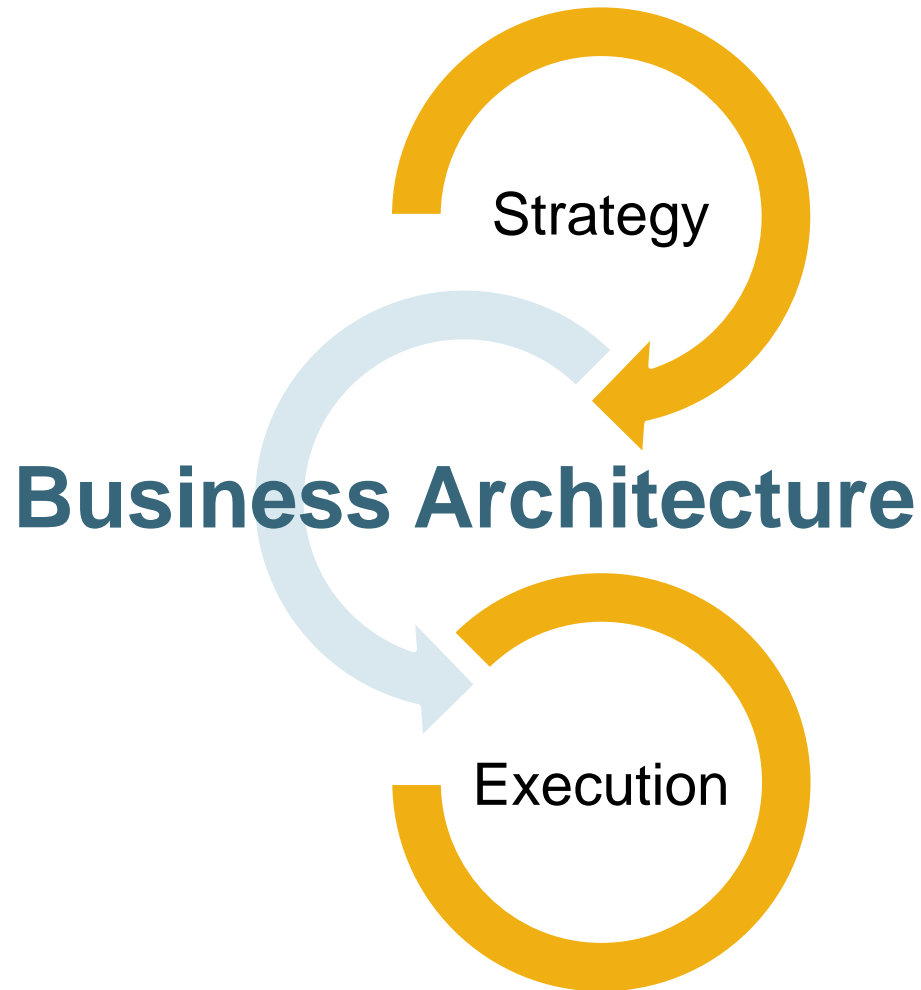
Manager, Internal Consulting

- 16 years with Securian Financial Group
- Bachelor's degree in Banking and Financial Economics from the University of North Dakota
- Experience with consulting, PMO development and event planning
- Currently managing Securian's internal consulting team which focuses on project management and change leadership for top strategic enterprise-level initiatives

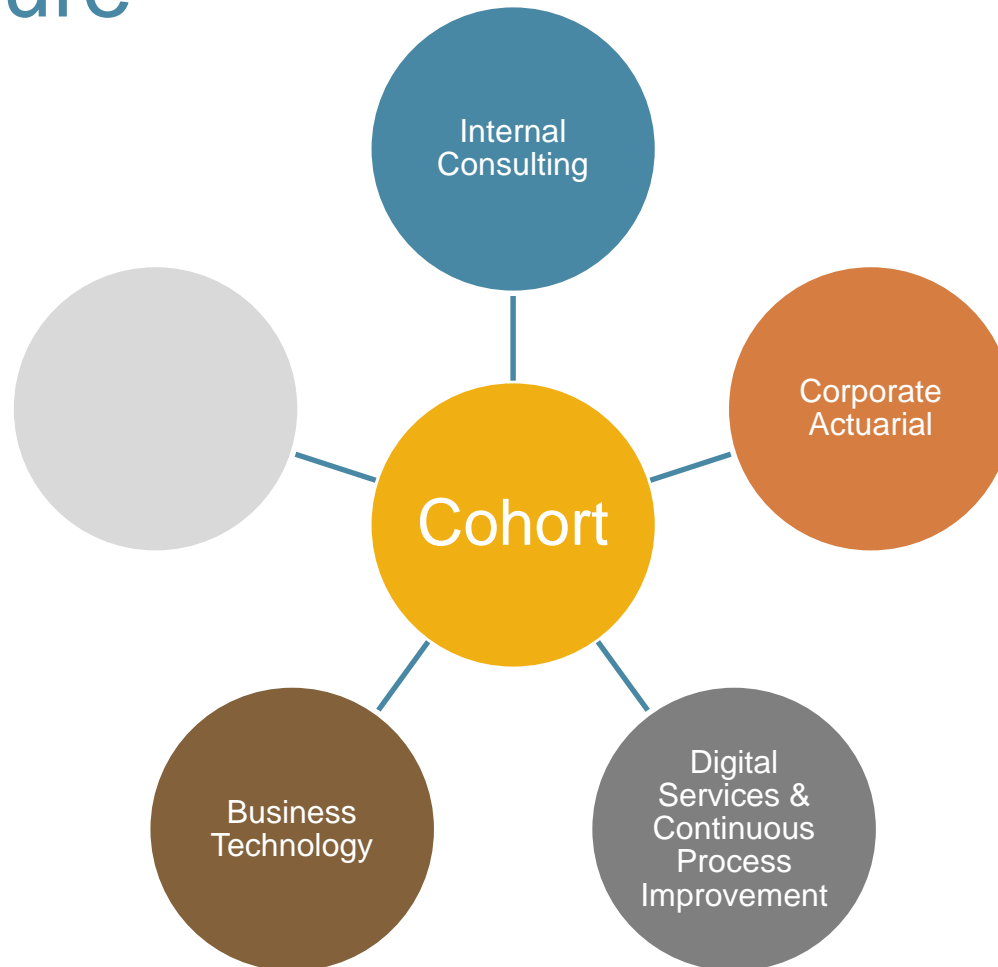
Agenda

- Business Architecture: Identifying the need and aligning a support structure
- Case study: Using Business Architecture to define a program
- Case study: Aligning capabilities with strategy
- Case study: Aligning capabilities with customer experience

Identifying the need

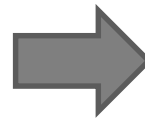


Supporting and Promoting Business Architecture



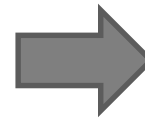
Paradigm shifts needed for success

Starting with the WHAT



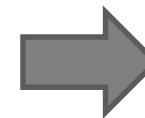
Starting with the WHY

Prioritize by EFFORT/IMPACT



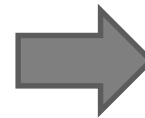
Prioritize by VALUE/MATURITY

Definition by SILO



Definition for ENTERPRISE

Roadmap by PROJECT



Roadmap by CAPABILITY

Case Study

Defining a Program



Desiree Manning

Senior Corporate Actuarial Initiatives Manager

- 19 years with Securian Financial Group
- MBA, Carlson School
- PMP certification and Business Architecture certificate
- Experience with consulting, enterprise program/project management, PMO development and strategic planning
- Enterprise project best practices and PMO leadership positions

The Need

- Modernize two inter-woven functions
- Mix of corporate and operating division stakeholders
- Co-executive sponsors: “critical friendlies”
- Permission to try Business Architecture techniques

External Landscape

- Education sessions with major consulting firms
- Clearly using Business Architecture techniques
- Validated our recommendation
- Free capabilities workshop with top executives

Workshop Exercises and Outcomes

Future state

1. Vision: 3 words
2. Time spent: % now & % future
 - Operations (accurate and efficient)
 - Strategy (setting and execution)

Current state

3. Capability assessment
4. Enablers assessment

Vision

Vision:

Executive Team	2 nd Leadership Team
Strategic, insightful, efficiency, sought after	Strategic, insightful, efficient, top talent

Time Spent:

	Strategic	Operational	} For both workshops
Current state	15%	85%	
Future state	50%	50%	

Capability Heat Map

RED = Significant gaps or pain points, takes too long, we don't do it							People: Right # people? Right skills?						
GREEN = Performing as expected, "no" changes needed							Process: Consistent, efficient, accurate, repeatable?						
YELLOW = In between red and green							Technology: Meets current and future business needs? Easy to use?						
							Data: Accurate, complete, accessible and timely?						
CAPABILITY	Exec	AOG FPG	ENABLERS DRIVING RED				CAPABILITY	Exec	AOG FPG	ENABLERS DRIVING RED			
			People	Process	Tech	Data				People	Process	Tech	Data
Capability #1							Capability #4						
1.1	Yellow	Yellow					4.1	Red	Red	X	X	X	X
1.2	Green	Green					4.2	Yellow	Green				
1.3	Green	Yellow					4.3	Red	Red	X	X	X	X
1.4	Green	Green					4.4	Red	Red	X	X		
1.5	Green	Yellow					4.5	Green	Yellow				
1.6	Yellow	Green					4.6	Red	Red	X	X	X	X
1.7	Yellow	Red	X	X	X	X	4.7	Red	Yellow				
Capability #2							Capability #5						
2.1	Red	Red		X	X	X	5.1	Yellow	Green				
2.2	Red	Yellow					5.2	Green	Green				
2.3	Yellow	Yellow					5.3	Yellow	Yellow				
2.4	Green	Green					Capability #6						
2.5	Green	Green					6.1	Yellow	Yellow				
Capability #3							6.2	Yellow	Yellow				
3.1	Yellow	Yellow					6.3	Green	Green				
3.2	Red	Yellow					6.4	Green	Green				
3.3	Yellow	Green					6.5	Red	Yellow				

Workshop Benefits

- Shifted beliefs from It's not broken => We need to change
- Gained important leadership alignment and buy-in
- Exposed participants to a capabilities map and way of thinking
- Demonstrated the value of at least one business architecture technique

Case Study

Aligning Capabilities with Strategy

Nina Munson, Digital Service & ECPI Program Manager

December 7, 2017



Nina Munson, CBA®, CPPM, FLMI, ACS

Digital Service & ECPI Program Manager

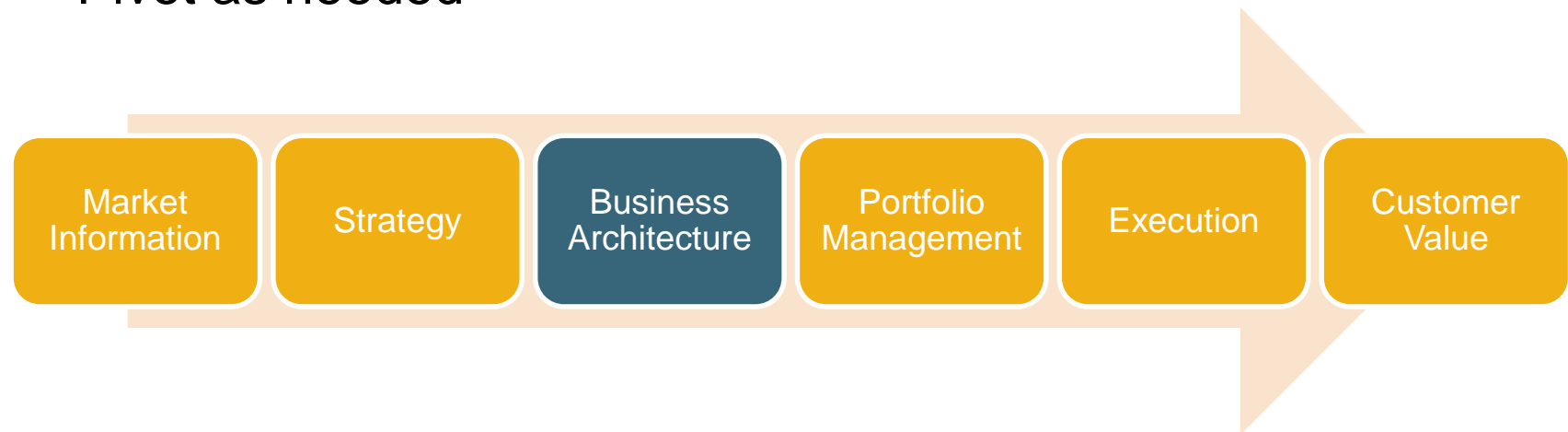
- 18 years with Securian Financial Group
- Bachelor's degree in Finance from Metro State University
- Various accounting, finance, and project management positions
- Experience with large distribution, product, and finance projects
- Currently the program manager for digital service transformation and enterprise continuous process improvement programs

Case Study: Business Architecture Education

- Line of business
 - Desire for stronger alignment of strategy with execution
- Current state
 - Identifying the right work
 - Understanding what needs to change in the organization
 - Knowing when we are done
- Desired future state
 - Common understanding of the capabilities within the organization
 - Capability heat map and roadmap

Case Study: Business Architecture Education - Illustration

- Ingest market data
- Determine strategies
- Link strategies to tactical demands
- Prioritize and execute projects
- Pivot as needed



Case Study

Aligning Capabilities with Customer Experience

Nina Munson, Digital Service & ECPI Program Manager

December 7, 2017

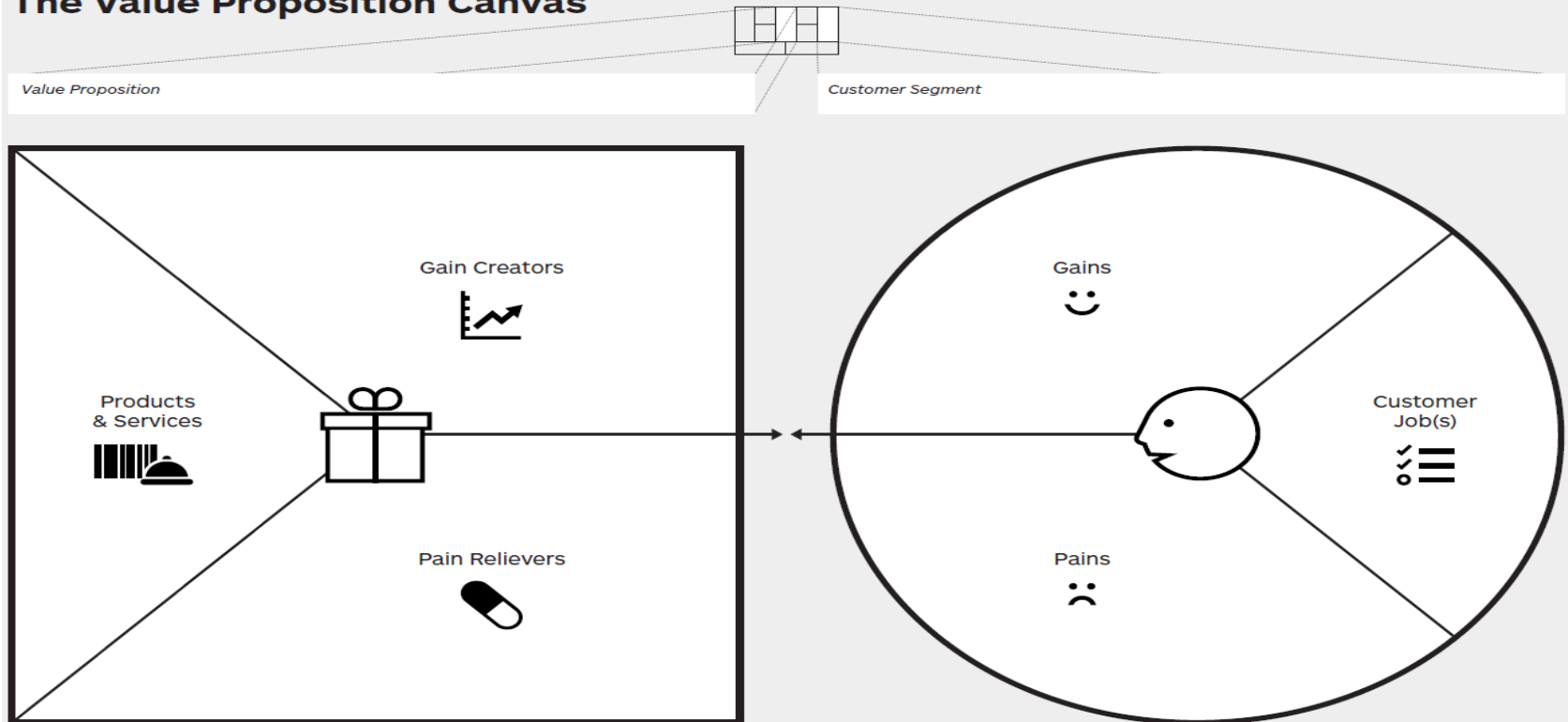


Case Study: Business Architecture Application

- Enterprise strategy
- Near-term focus area
 - Improve **current** customer and channel partner experience through digital capabilities
- Longer-term focus area
 - Enhance capabilities for **target market** customers and channel partners
- Tools and techniques
 - Value proposition canvas
 - Customer journey maps
 - Capability heat map and roadmap

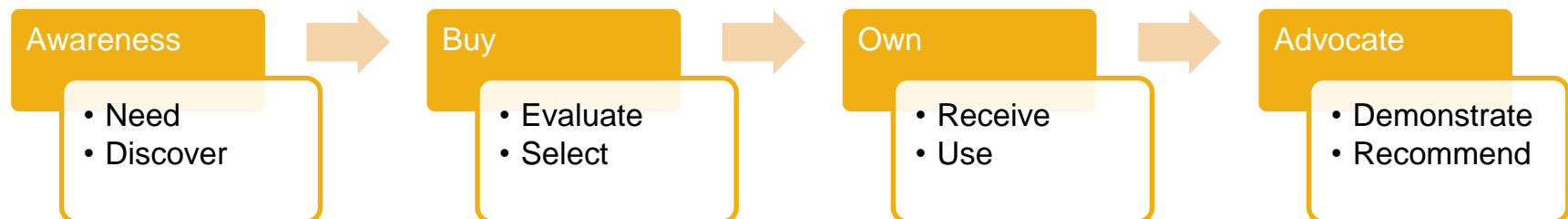
Case Study: Business Architecture Application – Value Proposition Canvas

The Value Proposition Canvas

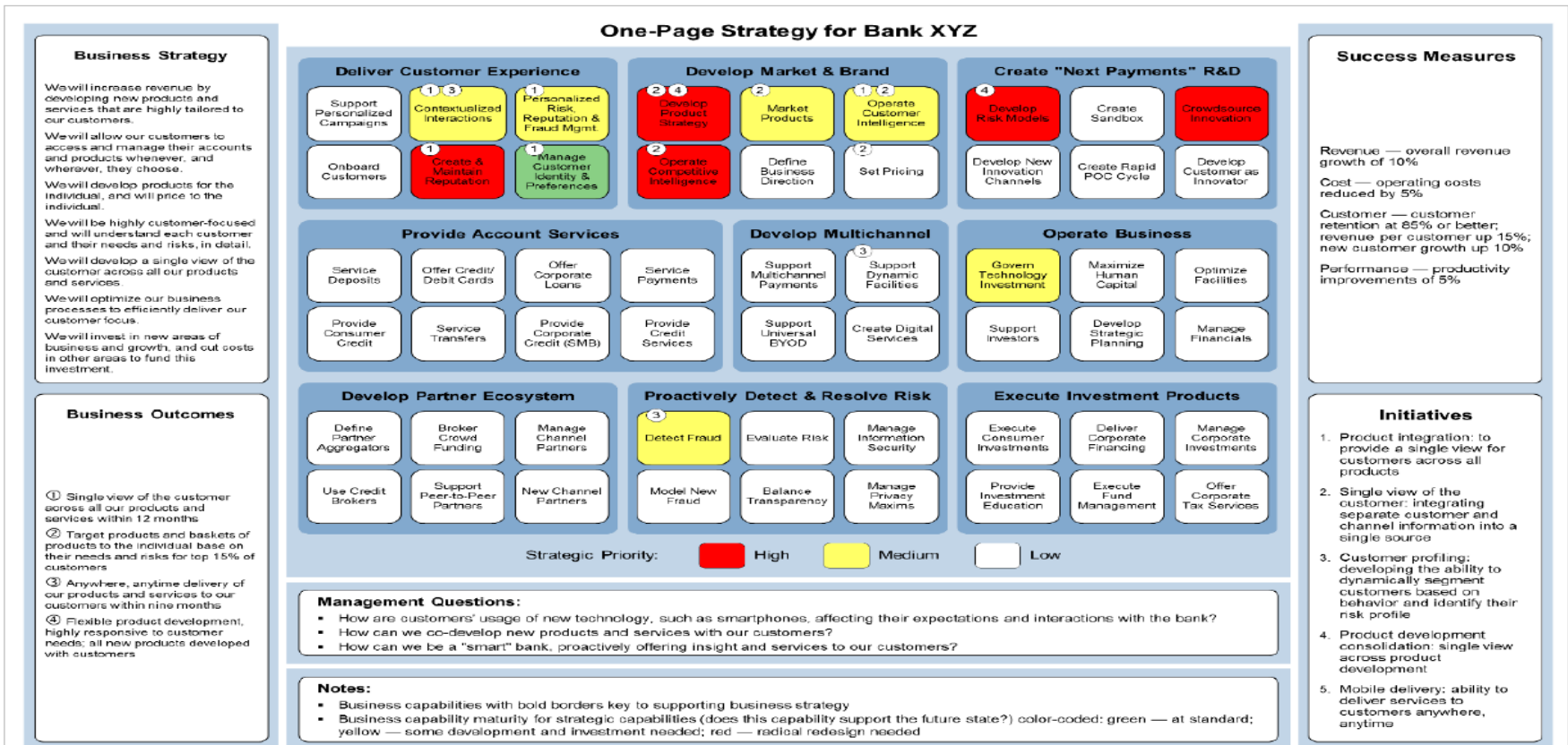


Case Study: Business Architecture Application – Customer Journey Map

- A diagram that illustrates the steps and experience customers go through engaging a company.
 - Job to get done
 - Thinking, feeling, doing
 - Gains and pains
- Company point of view (current state and future state capabilities)
- Initiative assessment



Case Study: Business Architecture Application – Capability heat map and roadmap



Initiatives

1. Product integration: to provide a single view for customers across all products
2. Single view of the customer: Integrating separate customer and channel information into a single source
3. Customer profiling: developing the ability to dynamically segment customers based on behavior and identify their risk profile
4. Product development consolidation: single view across product development
5. Mobile delivery: ability to deliver services to customers anywhere, anytime

What's Next and Questions

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