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

Business Architecture

Strategy

Execution
Supporting and Promoting Business Architecture

- Internal Consulting
- Corporate Actuarial
- Business Technology
- Digital Services & Continuous Process Improvement
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
Securian Financial Group

Vision

Vision:

<table>
<thead>
<tr>
<th>Executive Team</th>
<th>2nd Leadership Team</th>
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<tbody>
<tr>
<td>Strategic, insightful, efficient, sought after</td>
<td>Strategic, insightful, efficient, top talent</td>
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Time Spent:

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<td>Future state</td>
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For both workshops
**Capability Heat Map**

**RED** = Significant gaps or pain points, takes too long, we don’t do it  
**GREEN** = Performing as expected, "no" changes needed  
**YELLOW** = In between red and green

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**ENABLERS DRIVING RED**

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**People:** Right # people? Right skills?  
**Process:** Consistent, efficient, accurate, repeatable?  
**Technology:** Meets current and future business needs? Easy to use?  
**Data:** Accurate, complete, accessible and timely?
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
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

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<th>Awareness</th>
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Case Study: Business Architecture Application – Capability heat map and roadmap
What’s Next and Questions