

Case Example: Strategic Planning and Journey Management

1. Situation

- Large commercial U.S. property/casualty insurer and U.S. personal lines insurer
- Total revenues of more than \$20B; and assets of more than \$100B
- On Fortune 500 list of largest U.S. Companies
- More than 33,000 employees

3. Deliverables

- Strategic planning to codify mission, vision, core strategies, & value proposition
- Enterprise-wide Journey Management planning to support five-year growth plan:
 - Enterprise & Functional change metrics
 - Capability mapping & future state readiness; Route maps
 - Prioritization method; stakeholder communication plan & governance
- Business risk assessment & design of field restructuring
- Strategic planning for current and future year

**Financial
Services
Company**

2. Key Issues

- CEO chooses structure with team of more than 10 direct reports
- All DR's driven with high intellectual horsepower
- Significant success of business; attracting much attention from analysts, management committee, and other divisions
- Prioritization and sequencing of organizational change initiatives is a critical factor in controlling sustainable profitable growth

4. Results

- Strengthened leadership team by improving alignment & accelerating execution of the Marketing vision
- Created a sustainable high performance management-based culture by clarifying roles & responsibilities, increasing accountability and improving individual and team performance; Implemented SMART goal setting and KPI metrics

The size of Conequity's team enabled them to rapidly deliver a high quality product at a price point that far surpassed that which we've received from larger consultancy firms."

CEO