

Preliminary Engagement Briefing

Instructions

- Briefings will be conducted in class on Monday, February 24, 2014.
- Each team will have 20 minutes. Arrive on time!
- Presentation files should be sent in Adobe PDF format *via email prior to class time*. Include the entire class and instructor in the distribution.
- Bring printouts of your presentation materials for everyone in the class.
- Prior to the presentation, questions are encouraged via email at any time. However, the CEO's time is valuable so make sure you investigate your concern first and state your question clearly and succinctly. Providing an example is your best method to getting a solid answer.

Overview

The CEO of ArchiSurance is looking to grow his company. While his management team is focused on the near term task of realizing merger synergies through post-merger integration, he's looking for more. Recent market events and his trusted advisors suggest that a combination of insurance and banking products for retail customers can be a compelling product offering – termed by market analysts as 'bancassurance'. Before jumping into the banking market, the ArchiSurance CEO wants to understand retail banking and its synergies with the insurance business better.

Your task is to develop a presentation explaining the basics of the banking operating model and the opportunities and challenges of creating a combined banking and insurance business within the context of ArchiSurance's current situation. You will use your knowledge of the business model canvas technique, operating models, and capability maps to create a presentation. You'll also research the bancassurance model and key aspects of the retail banking industry such as banking "core systems" used to provide the IT infrastructure for most modern banks.

The CEO of ArchiSurance has given you background materials on his company in the form a case study describing his current situation. He's looking for you to prove your understanding of that situation by being able to represent it in a meaningful way that can lead to further decisions about the company's future and that he can use in communicating with his stakeholders both inside the company and to shareholders and market analysts studying his company. This initial presentation will likely lead to further work for you as you help the CEO and his management team work through the post-merger integration challenges they face.

Given that you're a small consultancy you'll be relying on a (silent) partner for expertise in the banking and insurance industries. Infosys has compiled and published a wealth of materials that you may borrow from for your analysis and presentation materials. However, while you can borrow from Infosys' published materials, you're on your own to organize and present them in a compelling way to the client. You'll also find that you need to extend or change their approach to suit the particular situation of your client.

Deliverables

1. **[20%] Research Notes.** Prepare for your presentation by making research notes – details and background about what you discover that will help your team prepare both the presentation as well as respond to questions or prepare future work. Research retail banking operating models and include your sources of information. Searches for ‘bancassurance’ and ‘banking core model’ will help here. Look to the materials from Infosys to help. Regardless of your approach, the CEO wants to understand where key products like ‘loans’, ‘deposits’, and key delivery channels like Internet, ATMs, and physical bank branches with tellers fit in. The objective here is to provide detail for your entire team to be “on the same page” and informed during the presentation where other team members may answer questions. You will be required to submit these notes typewritten form (Adobe PDF from Microsoft Word, LibreOffice Write, Google Docs, or Apple iWrite) as part of your completed assignment.
2. **[60%] Presentation.** Practice! Making a set of slides is only part of the work. Choose which team member will present for you carefully. You will have to alternate presenters on later assignments. Provide a PowerPoint or Adobe PDF presentation file with speaker notes sufficient for your presentation time. Note, this will likely require less than 1 slide per minute and you should practice and time your presentation so as not to be short or long on time. Your objectives at this point are to explain what retail banking is about, how it looks from an enterprise architecture perspective, and what synergies or opportunities there are between banking and ArchiSurance’s current situation. Assume that you are preparing the file to be delivered by your consulting firm’s salesperson so it should be easy to understand and clearly documented (however you will also make the presentation). You will have a lot of research. Your job for the presentation is to simplify and organize it to tell a story.
3. **[20%] Meeting Notes.** You will update this presentation for future deliverables based on class feedback for your final deliverable. You should have one teammate capture notes for you during your presentation. You will be required to submit these notes typewritten form (Adobe PDF from Microsoft Word, LibreOffice Write, Google Docs, or Apple iWrite) as part of your completed assignment. These files will be shared and discussed with the entire class.

Executive Presentation Rubrics

Note: Each team member will also need to self-evaluate themselves and other team members for team contribution with a separate set of rubrics.

	Excellent/Mastery 4	Competent 3	Needs work 2	Unacceptable 1
Organization & Content	Information presented in logical, interesting, and flowing sequence with content depth that supports assertions and recommendations	Logical sequence of information allows the audience to follow presentation, assertion support is mostly evident	Audience has difficulty following the presentation, unsupported assertions or illogical conclusions	Presentation has no logical sequence of information, content is disorganized, irrelevant, or inaccurate
Research, Subject Knowledge, Resources	Presenter demonstrates expertise in subject through clear and concise explanation, elaboration, question and answer, and delivery of key points. Credible, in-depth, and accurate research and data analysis with cited references that support the presentation.	Presenter demonstrates in-depth subject knowledge, is at ease with material, answers questions thoroughly, solid research with cited references	Basic knowledge of subject is demonstrated, but elaboration is minimal or presenter fails to answer questions, references missing or limited research	Presenter does not have an accurate grasp of information and cannot intelligently answer questions about the subject, plagiarism
Visual Aids	Clear and creative visual aids enhance the presentation, reinforce key points, and engage the audience	Presentation has relevant visual aids that provide evidence to support assertions and recommendations	Limited visual aids support presentation	Presentation has no significant support from visual aids, may include spelling and grammatical errors, is irrelevant, or difficult to interpret
Delivery	Presenter clearly and compellingly communicates ideas and engages the audience, concise highlighting of key points is engaging.	Presenter clearly and effectively communicates key ideas; speaking and pace are comfortable for audience.	Presenter's pace is too slow or fast, jumps around, voice is low or unclear, multiple interjections distract audience, or presenter fails to elaborate on key findings. Presenter is at times confused.	Presenter reads slides, mumbles, speaks too quietly, has little to no eye contact, and has many non-word or filler interjections (um, uhh, ahh, well, so, etc.). Presenter is confused.