

Executive KPIs

**Business Value Framework — Aviva**

- Cash generation increase
- Customer Net Promoter Score improvement
  - Customer retention rate
- Market share in Wealth and Insurance
- Operating profit growth

Financial / Operational KPIs

- Bulk Purchase Annuity business volume
  - Combined operating ratio
  - Customer acquisition cost
- Number of marketing permissions
- Sales to existing customers percentage

Value Chain & Functions

Insurance

- Develop new insurance products
- Enhance claims automation

Wealth Management

- Expand digital platform capabilities
- Launch targeted marketing campaigns

Customer Experience

- Implement personalized customer interactions
  - Upgrade MyAviva platform features

Operations

- Optimize resource allocation
- Streamline operational processes

Marketing

- Enhance customer segmentation strategies
- Increase digital marketing efforts

Integration Management

- Conduct integration workshops
- Monitor integration performance metrics

Insurance — Operational KPIs

- Customer claims processing time
  - Operating profit margin
  - Policy renewal rate

Wealth Management — Operational KPIs

- Assets under management growth
  - Client retention rate
  - Platform usage rate

Customer Experience — Operational KPIs

- Customer satisfaction score
- Online Experience Score
- Response time to customer inquiries

Operations — Operational KPIs

- Cost per transaction
- Integration timeline adherence
- Operational efficiency ratio

Marketing — Operational KPIs

- Brand awareness score
- Customer engagement metrics
- Lead conversion rate

Integration Management — Operational KPIs

- Employee retention post-acquisition
- Integration milestone achievement
- Synergy realization rate

Strategic Priorities

Enhance customer experience

Technology Enablers

- Develop mobile application enhancements
- Invest in AI-driven customer service tools

Drive operational efficiency

Technology Enablers

- Adopt cloud-based operational platforms
- Implement process automation solutions

Expand market presence

Technology Enablers

- Enhance digital marketing technologies
- Utilize data analytics for market insights

Leverage technology for growth

Technology Enablers

- Explore blockchain for transaction security
- Integrate advanced analytics in decision-making

Achieve financial synergies from acquisitions

Technology Enablers

- Implement shared services model
- Standardize IT systems across entities