LOCKTON HACKATHON 2026

Global Architecture Summit

Winter Games Edition

CHALLENGE GUIDE

Wednesday, January 14, 2026

How to Choose Your Challenge

- Teams self-select which challenge to tackle, or bring their own
- Multiple teams can work on the same challenge
- Choose based on your team's skills and interests

Challenge Quick Reference

#	CHALLENGE	CATEGORY	POINT OF CONTACT
1	Associate Information Hub	Associate Experience	Molly Berndt & Jamie Shaw
2	Receptionist Lookup Modernization	Associate Experience	Tricia VanDruff
3	Invoice Approval Accelerator	Associate Experience	Karthik Ramadoss
4	ADO Meeting Assistant	Associate Experience	Beth Handley-Bauer
5	Accounting View Agent	Associate Experience	Nandini Gopinath
6	Insurance Market Intelligence	Business Process	Vince Gaffigan & Laurel Allison
7	ACH Verification System	Business Process	Thomas Nichols
8	Central Invoice Hub	Business Process	Thomas Nichols
9	IT Budget Forecasting	IT Process	Thomas Nichols
10	Purchase Orders for Office/Facilities	IT Process	Thomas Nichols

ASSOCIATE EXPERIENCE CHALLENGES

These challenges focus on improving the daily experience for Lockton associates, streamlining workflows, and enhancing productivity through better tools and processes.

Challenge 1: Associate Information Hub

Point of Contact: Molly Berndt & Jamie Shaw

The Problem

Associates need to access key information about themselves—employee ID, department codes, operating unit, and organizational relationships—but this data is scattered across multiple disconnected systems. The legacy Associate Directory app that once provided a single source is being deprecated, and there's no modern replacement that consolidates this information.

Today's Reality

- Employee ID is generated in PeopleSoft but not easily accessible to associates
- Link sometimes displays employee ID, but inconsistently
- Operating unit/department codes require access to Venna or Concur (not all associates have access)
- Custom department assignments are only visible in the legacy Associate Directory
- Org relationships and team structures require navigating multiple systems
- Associates must visit 3-4 different places to gather information they need for benefits enrollment, expense reporting, or signing up for services like Personify

Your Mission

Create a modern, unified solution that gives associates easy access to their own employment information—employee ID, department codes, operating unit, custom department, and organizational relationships—through a single interface that integrates with existing tools like Microsoft Teams.

Deliverables

- Single-source lookup for associate's own employee ID, department codes, and operating unit
- Display of custom department assignment and organizational relationships
- Integration with Microsoft Teams or other modern interface
- Self-service access that doesn't require HR or IT support tickets

Resources Provided

Associate Directory data structure documentation, PeopleSoft field mappings, Sample use cases for when associates need this information (benefits enrollment, expense reporting, service sign-ups)

Challenge 2: Receptionist Lookup Modernization

Point of Contact: Tricia VanDruff

The Problem

Reception teams rely on a 25-year-old legacy Global Associate Directory app that works exceptionally well but is being deprecated by IT. The system provides instant, single-click access to critical information needed during live client calls across 9,000+ employees globally. The proposed replacement (Microsoft Teams) requires multiple clicks, lacks essential functionality, and is too slow for real-time call routing. Receptionists need a modern solution that maintains ALL current capabilities while meeting enterprise IT standards.

Today's Reality

- Single-click, instant access to employee information during live calls
- Cell phone directory (critical—Webex doesn't store cell phones)
- Position/title lookup determines call routing (executives route differently than producers)
- Backup contact information when primary person unavailable
- Office and department browsing (can search ANY office globally)
- Geographic browsing (North America, Asia Pacific, Europe)
- Partial name search (type 'MEG' to see all Megans with different spellings)
- Notes section where associates leave messages for reception team
- Status updates that sync to Outlook (In, Out, Meeting, Vacation, etc.)

Why It Must Be Replaced

- 25-year-old technology platform being deprecated
- HR no longer maintaining or updating the system
- IT infrastructure moving away from legacy systems
- Microsoft Teams (proposed replacement) is too slow and missing critical features

Your Mission

Create a modern replacement that maintains ALL current functionality while meeting enterprise IT standards. Speed is absolutely critical—receptionists cannot put live callers on hold while searching. The solution must be as fast or faster than the current single-click system while providing the comprehensive search capabilities reception teams depend on.

Deliverables

- Single-click lookup—be as fast as current system
- Display: name, position/title, cell phone, email, backup contacts, status, notes
- Associate self-service to update their own information and notes
- Partial name search (find all spelling variations)
- Search by office location, department, and geographic region
- View all members of a department with one action

Resources Provided

Sample directory data structure with all fields, Status code definitions, Current workflow documentation with screenshots, Office and department organizational structure, Sample call routing scenarios

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Challenge 3: Invoice Approval Accelerator

Point of Contact: Karthik Ramadoss

The Problem

Managers overseeing contractors and vendors receive invoices monthly (ranging from 15 to 270+ depending on the department), each requiring manual review and approval. The administrative overhead eats into time that could be spent on higher-value work.

Today's Reality

- Invoices arrive via email, require manual validation
- Each approval requires logging into a separate system
- No consolidated view of pending invoices across vendors
- Consulting invoices need hours verification; software/hardware orders could benefit from PO system

Your Mission

Automate invoice validation and consolidate approvals into a streamlined workflow.

Deliverables

- Automated invoice processing with validation
- Consolidated dashboard of all pending invoices
- One-click or batch approval capability
- Purchase Order (PO) process integration to streamline approvals

Resources Provided

Sample invoice data, Current workflow documentation, Approval requirements

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Challenge 4: ADO Meeting Assistant

Point of Contact: Beth Handley-Bauer & Heather Schemmer

The Problem

Project meetings generate requirements, decisions, and action items that must be manually translated into Azure DevOps tickets. This creates delays and risks losing important details discussed in meetings.

Today's Reality

- Meeting notes must be manually reviewed and converted to ADO tickets
- Epics, Features, and User Stories are created after the fact
- Important requirements discussed in meetings sometimes get lost
- Sprint planning relies on manual iteration creation

Your Mission

Utilize Copilot to listen to meetings and create ADO tickets for Epics, Features, and User Stories documenting requirements discussed throughout the project.

Deliverables

- Copilot integration that captures meeting content
- Automatic ticket generation for ADO work items
- Categorization into Epics, Features, and User Stories

Resources Provided

Sample meeting transcripts, ADO work item templates, Project structure examples

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Challenge 5: Accounting View Agent

Point of Contact: Nandini Gopinath

The Problem

Account teams need to check the status of accounting items across multiple systems (PeopleSoft, NX, Sagitta, BP, etc.). Currently, they contact the AIS service desk for every inquiry, creating bottlenecks.

Today's Reality

- Status inquiries require contacting the AIS service desk

- Information is spread across multiple disconnected systems
- Response times vary based on service desk availability
- Simple questions consume support team resources

Your Mission

Create an agent that can query PeopleSoft, NX, Sagitta, BP, etc. to answer questions from account teams on the status of accounting items—serving as first-level support before escalating to the AIS service desk.

Deliverables

- Conversational agent that understands accounting queries
- Integration with multiple backend systems
- Escalation workflow when agent cannot resolve

Resources Provided

System access documentation, Sample queries, Escalation criteria

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BUSINESS PROCESS CHALLENGES

These challenges address core business operations, focusing on automation, efficiency, and accuracy in processes that directly impact Lockton's services and client relationships.

Challenge 6: Insurance Market Intelligence

Point of Contact: Vince Gaffigan & Laurel Allison

The Problem

Analysts manually read carrier earnings call transcripts to extract market intelligence—a time-consuming process that delays quarterly reports and misses cross-carrier trends.

Today's Reality

- Analysts spend hours reading each transcript manually
- Quarterly reports are created one carrier at a time
- Market-wide themes are identified inconsistently (or not at all)

Your Mission

Automate the extraction of intelligence from earnings calls and generate standardized reports that surface market trends.

Deliverables

- Automated extraction from transcript to structured data
- Carrier Quarterly Report (using provided template)
- Market Themes Report synthesizing multiple carriers

Resources Provided

Carrier earnings transcripts, Report templates, Sample outputs

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Challenge 7: ACH Verification System

Point of Contact: Thomas Nichols

The Problem

ACH banking information changes need verification to prevent fraud and payment errors.

Today's Reality

- Banking information changes may not have a formal verification process
- Verification calls may not reach the right contacts
- Risk of fraudulent ACH redirects
- Process is inconsistent across departments

Your Mission

Build an automated verification system for ACH banking information changes that ensures authenticity and reduces fraud risk.

Deliverables

- Automated verification workflow for banking changes
- Multi-factor authentication for sensitive changes

- Audit trail and reporting for compliance

Resources Provided

Verification requirements, Compliance guidelines, Sample workflows

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Challenge 8: Central Invoice Hub

Point of Contact: Thomas Nichols

The Problem

Invoices handled by individual inboxes and manually tracked by separate offices. There's no system put in place to show what invoices have been paid.

Today's Reality

- Invoices exist in multiple disconnected locations
- Manual tracking through Excel sheets by department
- Payment status requires checking multiple systems manually
- Can only look up single payments at a time, no central report
- Budget impact analysis is manual and time-consuming
- Vendors often report payment issues 2-3 months after invoice submission

Your Mission

Create a central repository for all invoices with real-time payment status tracking and budget impact reporting.

Deliverables

- Centralized invoice repository with search capability
- Real-time payment status visibility
- Budget impact dashboard by department

Resources Provided

Invoice data samples, Budget structure documentation, Payment status definitions

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IT PROCESS CHALLENGES

These challenges target IT operational efficiency, cost optimization, and technology management processes that support the entire organization.

Challenge 9: IT Budget Forecasting

Point of Contact: Thomas Nichols

The Problem

IT budget management lacks transparency and accessible tools. Leaders struggle to understand current spend, forecast future needs, and make informed financial decisions without digging through spreadsheets or waiting for finance reports.

Today's Reality

- Budget data is scattered across multiple spreadsheets
- Forecasting is manual and time-consuming
- Limited visibility into spend vs. budget in real-time
- The only central report is manually created
- IT-specific notes and context get lost between planning cycles

Your Mission

Build a transparency and forecasting tool that helps IT leaders manage financial components with real-time visibility, IT-specific annotations, and predictive modeling.

Deliverables

- Dashboard showing current spend vs. budget by category
- Forecasting model for projecting future spend
- Ability to add IT-specific notes and context to budget items

Resources Provided

Sample budget data, Expense categories, Historical spend patterns

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Challenge 10: Purchase Orders for Office/Facilities

Point of Contact: Thomas Nichols

The Problem

We do not have a way to tie hardware orders to the budgeted line tracked by the fixed asset group. IT operations are 100% reactive to all hardware and tech orders in any office in the United States, creating delays and confusion about payment, ownership, and budget allocation.

Today's Reality

- Manual validation through email chains to determine who ordered what
- Invoices sit for months waiting for budget and payment information
- No connection between ordering documents/quotes and incoming invoices
- Constant back-and-forth to identify: vendor, ordering POC, office location, and budget source
- Example: Boston office relocation orders sat for months due to unclear payment structure

Your Mission

Create a purchase order system to align quotes to invoices to payments, providing clear tracking from order placement through payment completion.

Deliverables

- PO creation system capturing: vendor, ordering POC, office location, budget line
- Automated matching of PO to incoming invoices
- Lookup capability: search by PO number to see full order and payment status
- Validation workflow that flags mismatches between PO and invoice

Resources Provided

Sample order data with: vendor information, ordering POC details, office locations, budget line assignments, ordering documents/quotes examples

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Presentation Format

Each team has 10 minutes to present their solution:

TIME	FOCUS
1 minute	**Problem Statement —** why this matters
2 minutes	**Solution Overview —** what you built
4 minutes	**Live Demo —** show it working
3 minutes	**Q&A —** judges ask questions

Awards

- **Gold Medal** — Winning team
- **Silver Medal** — Runner-up
- **Bronze Medal** — Third place
- **Participation Recognition** — All attendees

LET THE GAMES BEGIN!

Good luck to all teams!