

Journey & Business Capability Canvas - Draft

May 2020



Life's brighter under the sun



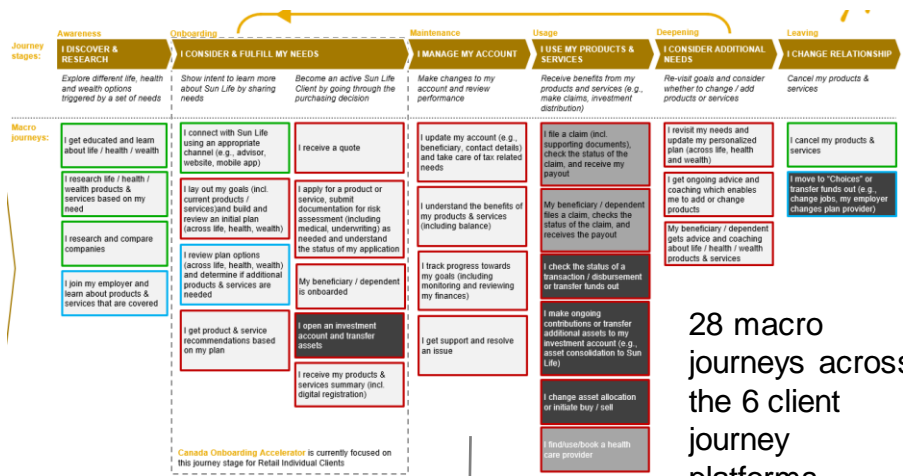
Jim's view



Client Canvas

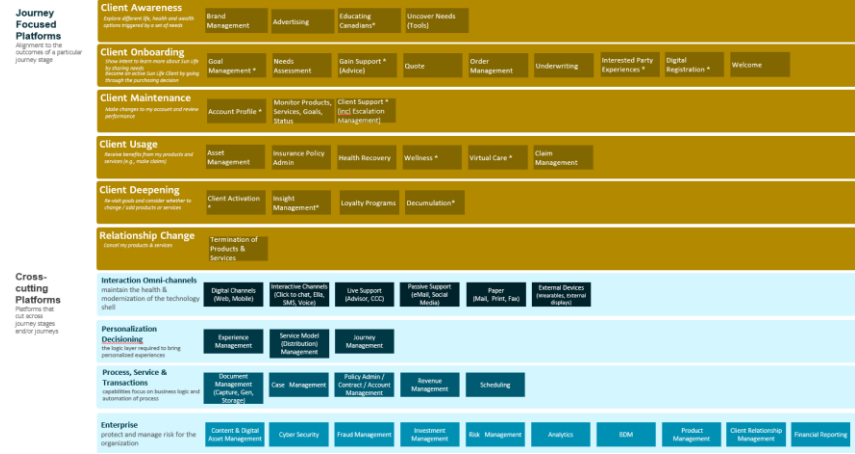


6 client journey "platforms" + 4 cross-cutting "platforms"



28 macro journeys across the 6 client journey platforms

Client Canvas



Jim's view – Composite client journeys...



Journey Stage		Platforms							
Client	Client Awareness	Brand Mgmt	Advertising	Education	Uncover Need				
	Client Onboarding	Goal Mgmt	Needs Assess	Gain Support	Quote	Order Mgmt	Underwriting	Int Party Exp	Dig Restrict
	Client Maintenance	Acct Profile	Monitor Prod	Client Supp					
	Client Usage	Asset Mgmt	Policy Admin	Hlth Recovery	Wellness	Virtual Care	Claim Mgmt		
	Client Deepening	Activation	Insight Mgmt	Loyalty Pgms	Decumulation				
	Relationship Change	Termination							
Advisor	Advisor Awareness	SLFD Mgmt	Educ Advisors	Adv Recruiting	Contracting				
	Advisor Onboarding	Training	Advisor Brand	Practice Setup	Lead Gen	Adv Digital	Adv Bus Plan	Welcome	
	Advisor Projecting	Bus Support	Adv Fin Mgmt	Office Space	Compliance	Com Outreach			
	Advisor Managing	Meeting Cap	Client Supp	Adv Partner	Client Perform	Advisor Reog	Advisor Activ		
	Advisor Leaving	Succession Pl	Blk Transition						
Sponsor	Sponsor Awareness	Brand Mgmt	Educ Sponsor	Sponsor Need	Sponsor UW	Quote			
	Sponsor Onboarding	Customization	Sponsor Integ	Policy Admin	Employee				
	Sponsor Admin	Empl educate	Empl enrol	Contrib match	Empl details	Billing	Empl support		
	Sponsor Usage	Claim usage	Absence Mgm	Plan review					
	Sponsor Deepening	Activation	Valuation						
	Sponsor Leaves	Deactivation	Transfer	Bankruptcy	Past clnt supp				
X-Journey	Interaction/Omni	Digital Channel	Interact Chan	Live Support	Passive Supp	Paper	External Devic		
	Personalization	Experience	Service model	Journey mgmt					
	Process/Service/Trx	Doc mgmt	Case mgmt	Policy admin	Revenue mgmt	Scheduling			
	Enterprise	Content	Cybersecurity	Fraud mgmt	Invest mgmt	Risk mgmt	Analytics	BDM	Product mgmt
		CRM mgmt	Financial rept						

Client Canvas

Journey Focused Platforms

Alignment to the outcomes of a particular journey stage

Client Awareness

Explore different life, health and wealth options triggered by a set of needs

Brand Management

Advertising

Educating Canadians*

Uncover Needs (Tools)

Client Onboarding

Show intent to learn more about Sun Life by sharing needs
Become an active Sun Life Client by going through the purchasing decision

Goal Management *

Needs Assessment

Gain Support * (Advice)

Quote

Order Management

Underwriting

Interested Party Experiences *

Digital Registration *

Welcome

Client Maintenance

Make changes to my account and review performance

Account Profile *

Monitor Products, Services, Goals, Status

Client Support * (incl Escalation Management)

Client Usage

Receive benefits from my products and services (e.g., make claims)

Asset Management

Insurance Policy Admin

Health Recovery

Wellness *

Virtual Care *

Claim Management

Client Deepening

Re-visit goals and consider whether to change / add products or services

Client Activation *

Insight Management*

Loyalty Programs

Decumulation*

Relationship Change

Cancel my products & services

Termination of Products & Services

Interaction Omni-channels

maintain the health & modernization of the technology shell

Digital Channels (Web, Mobile)

Interactive Channels (Click to chat, Ella, SMS, Voice)

Live Support (Advisor, CCC)

Passive Support (eMail, Social Media)

Paper (Mail, Print, Fax)

External Devices (Wearables, External displays)

Personalization Decisioning

the logic layer required to bring personalized experiences

Experience Management

Service Model (Distribution) Management

Journey Management

Process, Service & Transactions

capabilities focus on business logic and automation of process

Document Management (Capture, Gen, Storage)

Case Management

Policy Admin / Contract / Account Management

Revenue Management

Scheduling

Enterprise

protect and manage risk for the organization

Content & Digital Asset Management

Cyber Security

Fraud Management

Investment Management

Risk Management

Analytics

BDM

Product Management

Client Relationship Management

Financial Reporting

Cross-cutting Platforms

Platforms that cut across journey stages and/or journeys

Advisor Canvas - SLFD

Journey Focused Platforms

Alignment to the outcomes of a particular journey stage

Advisor Awareness

Go through the recruiting process and become an advisor

SLFD Brand Mgmt

Educating Advisors*

Advisor Recruiting

Contracting

Advisor Onboarding

Get started and launch new practice

Training, Continued Training, Certification*

Advisor Brand & Space

Practice Set-up

Lead Generation

Advisor Digital Presence & Referrals

Advisor Business Planning

Welcome

Advisor Prospecting

Develop the practice and manage ongoing needs

Business Support

Advisor Financial Management

Office & Space Management

Practice Compliance Management

Community Outreach

Advisor Managing

Uncover client needs, initiate a relationship with client, help client with purchasing decisions, service / advise for ongoing needs, help clients receive benefits from products and services

Meeting Capabilities

Client support capabilities

Advisor partnerships / business referrals

Client Performance Monitoring

Advisor recognition

Advisor activation

Advisors Leaving

Leave Sun Life (voluntarily or involuntarily)

Succession planning*

Block transition

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Advisor Canvas – 3P Firm

Journey Focused Platforms

Alignment to the outcomes of a particular journey stage

Firm Awareness

Evaluate providers, and decide to work with Sun Life

SL Brand Mgmt

Educating Firms

Identify Firm opportunities

Firm Onboarding

Understand Sun Life's offerings and value propositions

Educating advisors about Sun Life products & services

Contracting Firms

Compliance Management

Digital Registration for Advisors & Firms

Welcome

Business Support

Firm & Advisor Support

Advisor Branding

Advisor Digital Presence

Product Comparison Management

Advisor Financial Management

Community Outreach

Engaging with Clients

Meeting Capabilities

Client Support capabilities

Advisor partnerships / business referrals

Client Performance Monitoring

Advisor Recognition

Advisor Activation

Advisor Sales Support

Advisors Leaving

Decide not to work with Sun Life

Termination of Contract & Digital Access

What happens with Clients that still have policies

Records Management

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Sponsor Canvas

Journey Focused Platforms

Alignment to the outcomes of a particular journey stage

Sponsor Awareness

Explore different providers and make a decision

Sponsor Brand Management

Educating Sponsors

Sponsor Needs

Sponsor Underwriting

Quote / Product Compare

Sponsor Onboarding

Sign contract with a provider and onboard on the provider's systems

Sponsor customization

Sponsor system linkages

Policy administration training

Receive employees / welcome employees to program

Sponsor Admin

Administer policies

Employee education

Employee enrolment

Sponsor contributions / matching

Manage employee contract / account details

Billing / billing reconciliation

Employee support

Sponsor Usage

Ensure members receive benefits from the plan and / or products & services

Claim and Benefit Usage Reporting

Return to work / Absence Mgmt

Plan Review

Sponsor Deepening

Help members receive advice based on their activity and evolving needs

Sponsor Activation

Sponsor Valuation

Sponsor Leaves

Decide to leave Sun Life

Sponsor Deactivation

Sponsor transfers

Sponsor bankrupt

Past Client Support

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