

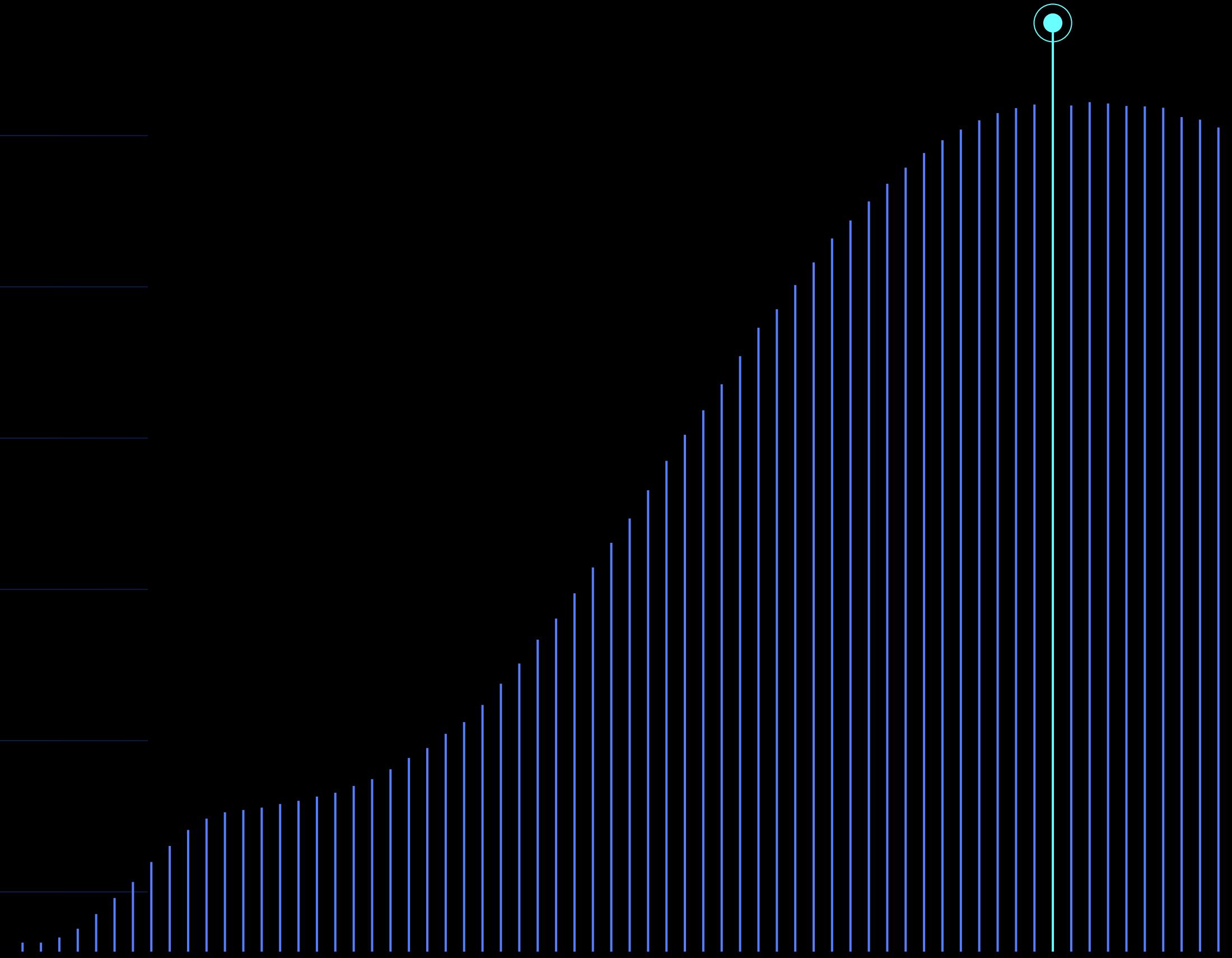
Backbase

# Ignite Labs SOP

Ways of Working

Expansion Sales Play

ignite



# Ignite Labs

Strategic Sales Play | Inspire clients | Create Roadmap | Co-create use cases

## Why

- Drive Strategic engagement in the account
- Align priorities to the Backbase platform
- Inspire vision to unlock transformational deals (pipeline gen.)

**Use Case Library** - Objective led | Vision led | Persona led

**Art of the possible** - Inspiration cases | Prototypes (if needed)

**To-be architecture** - High level architecture discussions on Backbase

4 hours

**workshopping**

1.5 days  
**onsite**



10+ use cases  
unlocked

TVP positioned  
In 2026 member strategy

Chief Strategy  
Member office  
Access unlocked

# Objectives of Ignite

01

## Elevating the Conversation

- Align with client on key organizational strategic objectives (1-3 year outlook)
- Align client objectives with Digital platform applications that can support achieving these goals

02

## Solving Challenges, Unlocking Opportunities for Client

- Explore key pain points or opportunities to improve driving value to customers while identifying opportunities to unify client digital ecosystem

03

## Reimagining the Future Together

- Co-create a joint roadmap for client priorities with Backbase, ensuring seamless integration and measurable impact.

client - Backbase Ignite

# Key Roles & Responsibilities -Backbase

Ignite Lab Squad

Role	Responsibilities
<b>Customer Success</b>	Owns overall orchestration, client comms, logistics, translate ignite lab into call to action
<b>Account Executive</b>	Manages commercial context, strategic relationships
<b>Value Consultant</b>	Owns discovery, strategic alignment, workshop facilitation, and use case framing
<b>Solution Engineer</b>	Prepares and runs demos, supports feasibility discussions
<b>Solution Architect</b>	Leads architecture workshop, assesses integration and technical fit

# Ignite Lab Pre-Ignition Day

# 1. Internal Preparation Activities

Planning of Ignite Labs day

Sl no	Activity	Objective	Inputs	Outputs	Ownership
1.	Internal Alignment Kickoff	Align internal team on client context, objectives, and plan	Client background, prior engagement history	Shared understanding, initial assumptions, roles assigned	Customer Success
2.	Assemble Internal Team	Confirm internal squad (CS, AE, VC, SE, SA) and align on responsibilities	Resource availability, client needs	Final team roster and role mapping	Customer Success
3.	Review Past Engagements	Review historical initiatives, current Backbase footprint, and identify areas for platform expansion	Account notes, past decks, CRM, platform usage data	Insights to avoid duplication, assess current footprint, and uncover new opportunities	Account Executive
4.	Prepare Stakeholder Map	Identify key client personas to involve across business, ops, and tech	Org charts, client input	Stakeholder matrix	Customer Success / Account Executive
5.	Workshop Planning Sync	Align on workshop agendas, data needs, and demo dependencies	Workshop templates, client inputs	Finalized calendar with internal prep actions	Value Consultant
6.	Demo Planning & Allocation	Plan who will build which demo (by use case and capability)	Use case library draft	Internal demo plan with owners and timelines	Solution Engineer
7.	Prepare Innovation Day Docket	Create a structured onboarding and context briefing pack for client stakeholders	Client insights, internal alignment notes	Innovation Day briefing document (docket) shared with client	Value Consultant
8.	Risk Identification & Mitigation	Identify risks in execution (timing, engagement gaps, dependencies)	Resource plans, internal assumptions	Risk tracker and mitigation plan	Customer Success

## 2. Client Facing Sessions/Workshop ( Pre Ignite)

Pre-Ignite day discovery workshops

Sl no	Activity	Objective	Inputs	Outputs	Attendees	Time with client	Ownership
1.	Kickoff & Planning	Align on Innovation Day purpose, expectations, and key stakeholders	Internal brief, client org map	Aligned session calendar, confirmed stakeholders	Customer Success, AE, VC, SE	45 mins	Customer Success
2.	Executive Strategy Workshop	Understand client's vision, priorities, and success criteria	Strategic plans, leadership insights	Strategic themes, north star direction	CS, VC, AE	60 mins	Value Consultant
3.	Customer Experience Workshop	Identify customer journey gaps and improvement opportunities + personas creation, validation & use case validation for personas	Journey maps, NPS data, app reviews	Key friction points, experience transformation goals, Personas & use cases	VC, SE , CS & AE	60 mins	Value Consultant
4.	Operations & Servicing Workshop	Assess servicing channels (branch, call center) and related challenges	Ops team input, real service scenarios	Shortlist of journeys to improve, automation & enablement ideas	VC, SE , CS & AE	60 mins	Value Consultant
5.	IT Architecture & TCO Workshop	Explore digital landscape, integration model, and total cost ownership	App landscape, integration map, cost metrics	Systems to rationalize, integration feasibility, tech challenges	VC, SE, SA, CS & AE	90 mins	Solution Architect
6.	Innovation Day Pre-Readout	Synthesize all insights and prepare aligned Innovation Day agenda & demos	Workshop outputs, draft use case library	Final Innovation Day structure, demo list, discussion prompts	VC, SE , CS & AE	60 mins	Value Consultant

# 1. Pre Ignite Session 1: Strategy Alignment

Pre-Ignite day discovery workshops

## Before the Session

- Research client's 1–3 year strategy from public reports, analyst calls, and past presentations
- Develop hypotheses around strategic goals (growth, customer segments, technology)
- Identify key executive personas and their expected decision criteria

## During the Session

- Present the Cascading Choices framework to guide conversation
- Ask exploratory questions on vision, top objectives, and transformation plans
- Validate Backbase hypothesis around strategic themes
- Capture KPIs, strategic bets, and roadmap alignment

## After the Session

- Align strategic themes with Backbase platform capabilities
- Refine "North Star" content and logic for Day 1 of Innovation Day
- Document validated objectives and use in prioritization model

## 2. Pre Ignite Session 2: Customer Experience

Pre-Ignite day discovery workshops

### Before the Session

- Analyze Client's public app ratings, reviews, and journey experience
- Build journey pain point hypotheses (e.g., disputes, onboarding, personalization)
- Look at segment>journey opportunity areas (banking and non banking)
- Convert challenges and opportunities to "How might we..." statements and use case clusters

### During the Session

- Use CU Digital Experience Map as a visual prompt
- Probe specific pain points (transaction disputes, channel switching, lack of relevance)
- Discuss customer/customer segment personas and current metrics (NPS, app usage)
- Validate and Co-create journey-based use case inventory

### After the Session

- Refine pain points into value-backed use cases
- Map each to potential Backbase accelerators or demos
- Select priority use cases for Innovation Day solutioning

### **3. Pre Ignite Session 3: Employee Experience**

Pre-Ignite day discovery workshops

#### **Before the Session**

- Draft hypotheses on known service and ops friction areas (e.g., MSR visibility, SLA breaches)
- Outline operational personas (call center, branch, collections)
- Prepare draft servicing journey map based on hypothesis or other sources

#### **During the Session**

- Lead discussion on servicing issues using real examples (e.g., ticketing delays, case handoffs)
- Validate Backbase assumptions about operational constraints
- Explore omni-channel support gaps (chat, video, live handoffs)

#### **After the Session**

- Define servicing improvement use cases
- Highlight automation, workflow, or AI opportunities
- Feed inputs to employee experience demos

# 4. Pre Ignite Session 4: IT Workshop

Pre-Ignite day discovery workshops

## Before the Session

- Review existing application stack and known platforms (e.g Dynamics, Genesys, OneView, etc.)
- Build hypothesis on functional redundancy and integration pain points
- Draft TCO drivers and digital maturity assumptions

## During the Session

- Ask about uptime targets, team capacity, vendor reliance, and integration pain
- Validate assumptions on scalability and modularity
- Identify key constraints and gaps to support future roadmap

## After the Session

- Finalize technical feasibility notes for use case mapping
- Document integration options or simplification paths
- Feed into solution architecture planning for Ignite Day

# 5. Pre Ignite Session 5: Executive Read Out

Pre-Ignite day discovery workshops

## Before the Session

- Synthesize outputs from all previous client-facing sessions
- Draft Innovation Day agenda, demo lineup, and storyboard flow
- Pre-populate use case themes with client-specific context

## During the Session

- Internally align on flow, roles, and final demo packaging
- Resolve open questions or resource dependencies
- Confirm client stakeholder alignment and discussion flow

## After the Session

- Finalize Innovation Day presentation materials
- Load demos and validate demo environments (SE)
- Schedule executive sign-off prep call

### 3. Backbase Internal Parallel Activities

Pre-Ignite day discovery workshops

Sl no	Activity	Objective	Inputs	Outputs	Ownership
1.	Daily Internal Syncs	Align Backbase team on key insights from each client session	Workshop notes, feedback	Adjusted demo plans, refined discussion points	Customer Success
2.	Use Case Library Development	Build and maintain a structured view of use cases by theme and journey	Workshop insights, strategic themes	Validated and categorized use case library	Value Consultant
3.	Demo Content Refinement	Adjust demos based on client feedback and evolving insights	Client reactions, VC guidance	Updated demo flows, screens, narratives	Solution Engineer
4.	Storyboard Development	Connect demos and discussions to value narrative and outcomes	Use cases, segment insights	Clear storylines for executive readout and day 2 prioritization	Value Consultant
5.	Technical Feasibility Assessment	Evaluate architectural fit and complexity for proposed use cases	Use case library, IT session output	Technical feasibility notes, recommendations	Solution Architect
6.	Prep Executive Readout Draft	Prepare visuals, summary slides and talking points for final day	Outputs from all workshops and activities	Draft executive slides, talking points, alignment call prep	Value Consultant
7.	Ignite Day Invites	Send out invites and map invitees from client side			Customer Success
8.	Dry Runs	Practice innovation day content in mock settings	Innovation day draft content	Refined storyline and prep for potential questions	Customer Success

# Key Input VC to SE- Use Case Design Pack

Pre-Ignite day prep document

## What It Is

A structured design artifact created after client workshops that captures:

- Persona-specific context (life moment, challenges, tech preferences)
- Validated “How Might We” questions
- Finalized use cases to demo
- Scene-by-scene demo storyboard with user actions and definitions of done
- UX requirements (flows, AI nudges, gamification, etc.)

## When It's Created

Immediately after **pre-Ignite Day client sessions**, during the solution shaping phase.

## How It's Reviewed

- Reviewed with **Solution Engineer** in a joint working session
- SE and VC validate feasibility, completeness, and alignment with demoable Backbase capabilities
- Refined to clarify scene transitions, triggers, and data assumptions

## Purpose for SEs

Serves as the **primary input** for SEs to design and build **Ignite Day demo prototypes**, ensuring:

- High relevance to client personas and moments
- Coherent storytelling with business value
- Alignment with client architecture and vision

# Ignite Labs Day

## Agenda - Day 1

	Description	Facilitator/Presentator	Time
Welcome & Context	Introductions and I-Day Context	CS & AE	09:00-09:30
Strategic Themes	Explain strategic themes in banks context	Client Executive	09:30-9:45
Art of Possible	Inspiration based on strategic themes	VC	09:45-10:15
Backbase Architecture Overview	Modern architecture overview aligned to strategic themes	SE/SA	10:15-10:45
Coffee Break			10:45-11:00
Bank Customer Use Cases	Workshop use cases with demo	VC & SE	11:00-13:00
Day 1 Wrap	Debrief Day 1 & Day 2 Trailer	VC	13:00-13:15
Lunch	Socialise with client teams	All	13:15-14:00

## Agenda - Day 2

	Description	Facilitator/Presentator	Time
Day 1 Recap	Summarize day 1 findings & action items	CS & VC	09:00-09:30
Bank Employee Use Cases	Workshop use cases with demo	VC & SE	09:30-11:00
Coffee Break			11:00-11:15
Build / Buy Decisions	Architecture Co-existence for use cases (What to build & what to adopt) with value articulation	SE/SA	11:15-12:45
Roadmap	Gamified Roadmap session (explore interest on the defined use cases )	VC	12:45 - 13:30
Next Steps & Debrief	Follow ups on use cases/feasibility/demo/deep dive solutioning	CS	13:30 :14:00

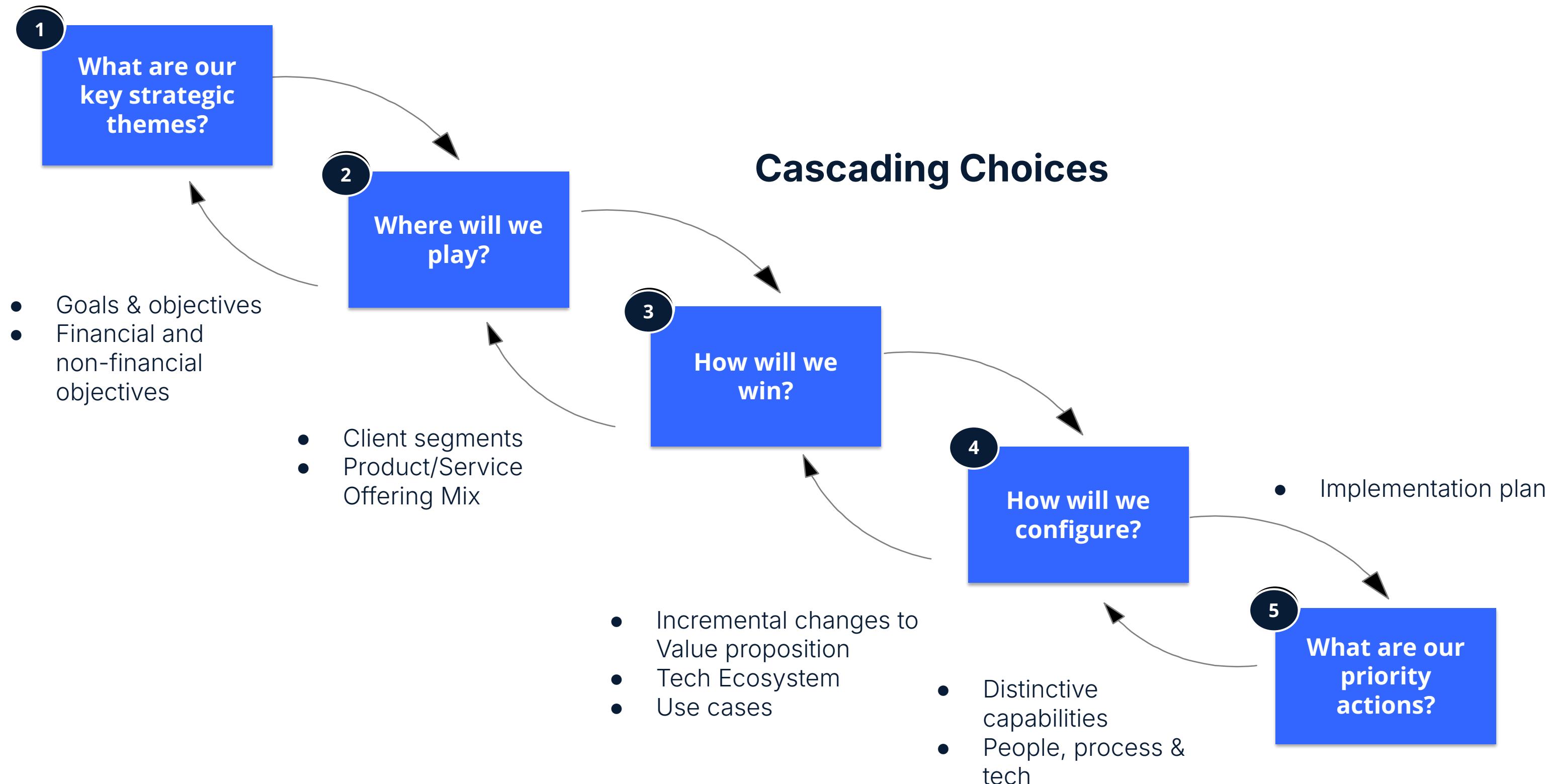
# THANK YOU

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Backbase

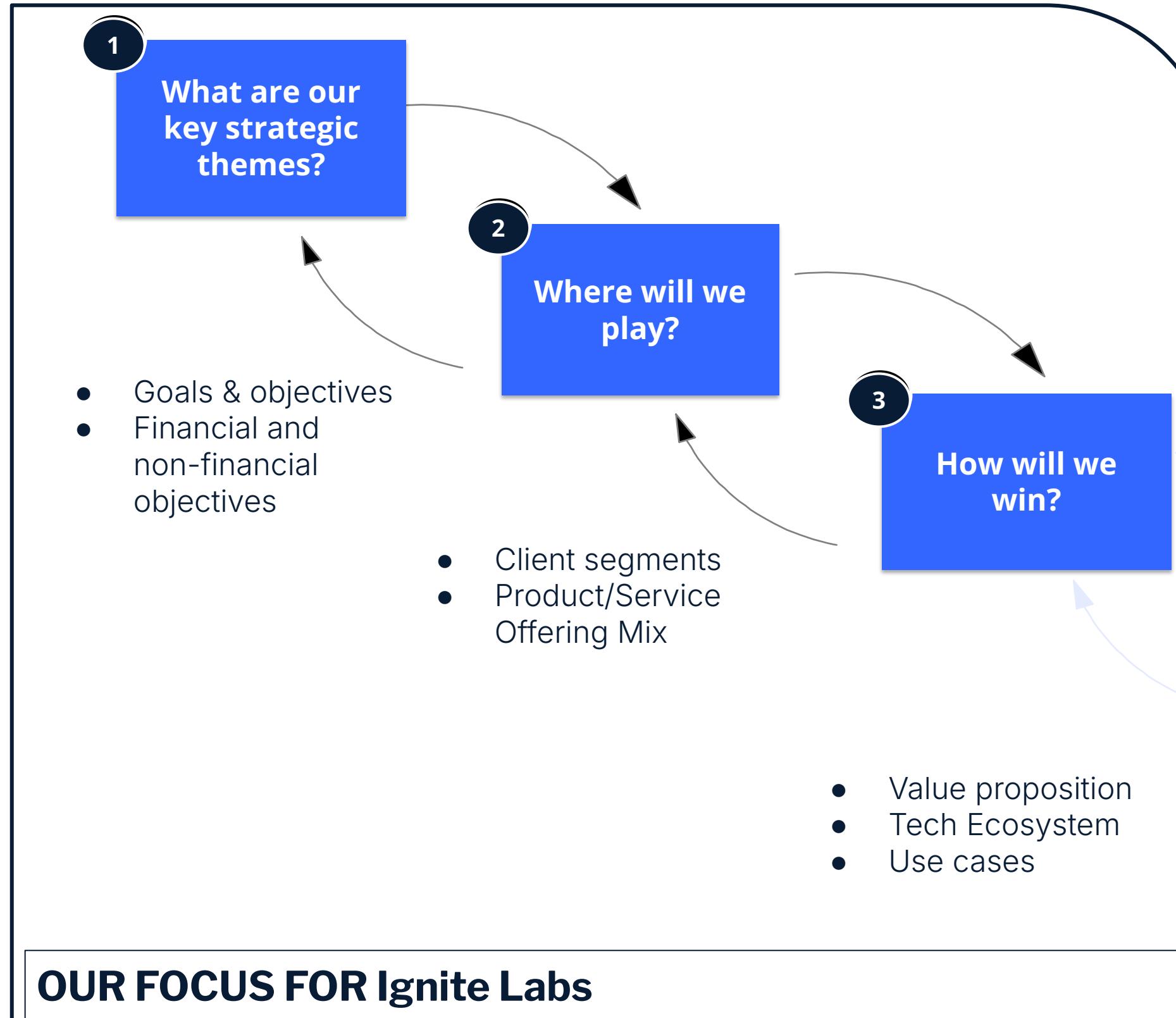
# Introduction to the Cascading Choices Framework

Success is about making the right choices

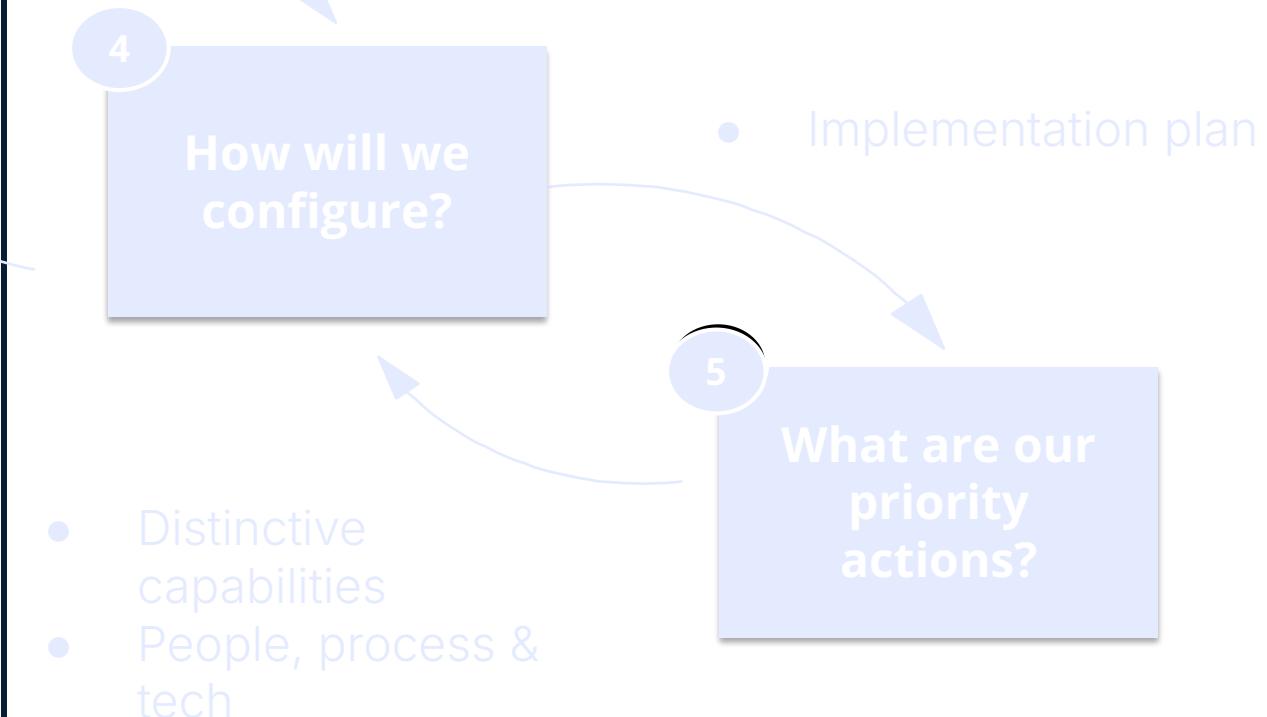


# Introduction to the Cascading Choices Framework

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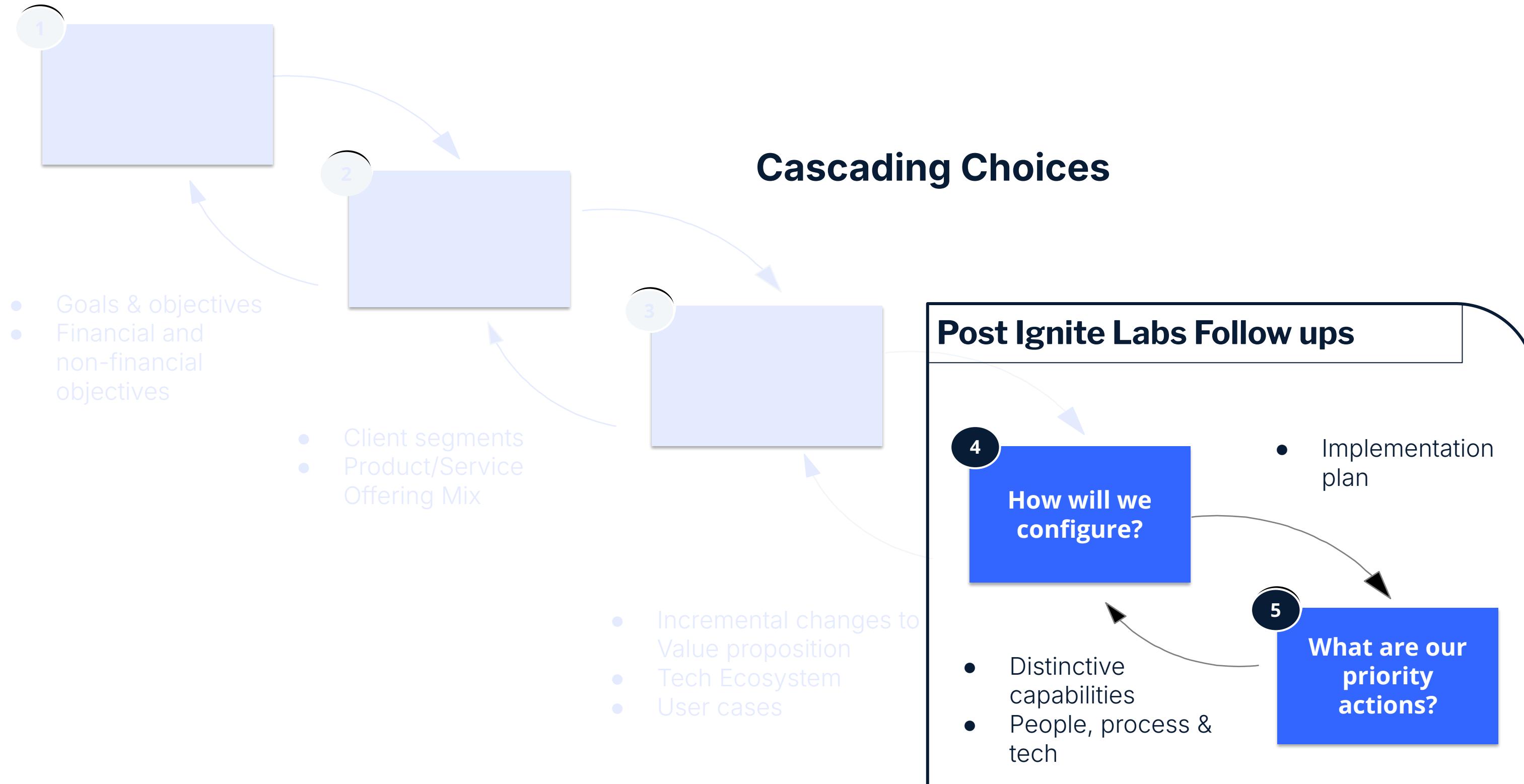


## Cascading Choices



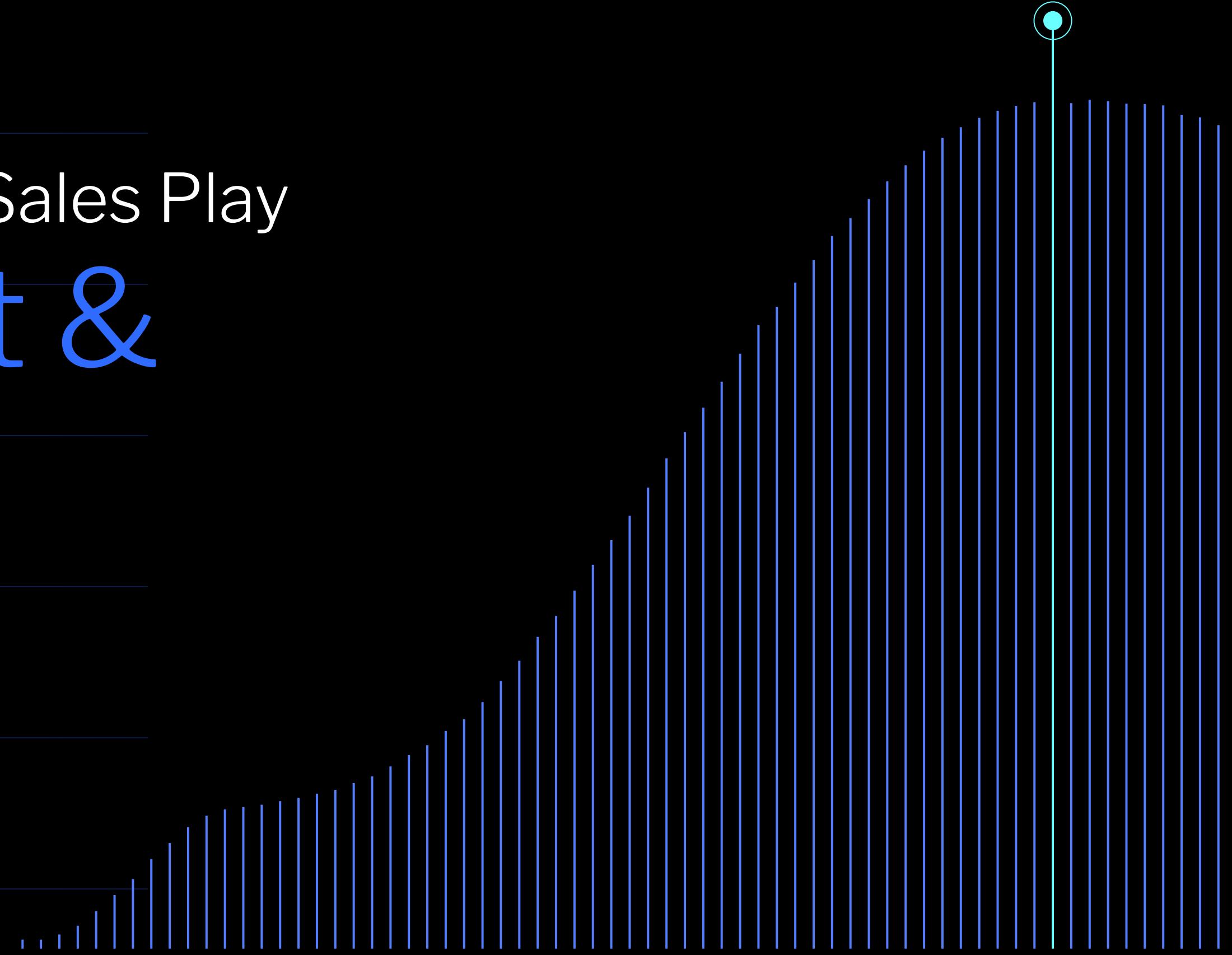
# Introduction to the Cascading Choices Framework

Success is about making the right choices



New Logo + Expansion Sales Play

# Assessment & Solutioning



# Assessment & Solutioning

Strategic Sales Play | Current state vs. Future state | Business Case | Roadmap

## Why

- Unlock business and tech challenges.
- Incept Unconsidered needs
- Align future state Backbase solution to real needs.
- Build stakeholder buy-in.
- Strengthens business case

**Journey Assessment** - Remove friction | Reduce cost | Improve revenue

**Application Portfolio Rationalization** - Reduce TCO | Lean portfolio

**Current & Future State architecture** - Architecture re-design

**Business Case** - Case for change

3 days onsite  
**assessment**

1 day  
**replay**



At risk to Growth  
account

\$750k +  
Retained revenue

+\$450k  
Additional revenue unlocked

+\$1 mn  
Additional opportunities identified



# Summary of the Engagement Plan | Key points



## Focus of Ignite Labs

Backbase engagement will be focused on presenting tailored proposition for Coutts Private Bank



## High level data intake

We will collect high level data around strategic priorities, processes and technology to develop use cases & business value



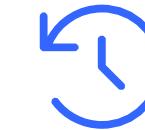
## 'V' Approach

We will start with executive statements, drill down on key themes at operational level and present it back during executive readout



## Tailored Content

Backbase will create tailored case studies, assessments and solutions /demos as per Coutts' strategic priorities & challenges



## 8-10 hours of Investment

Required **before meetings** (workshops, strategy & business alignment, branch, call center & IT) depending on agreed duration



## Validation ahead of time

Report and solutioning ready for executive read out by **mid-july**