



# Who are SE2

*Friday June 15<sup>th</sup> 2018*

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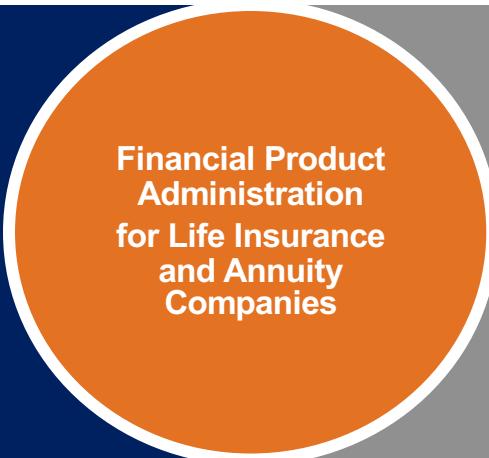


# What we do

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Call & Processing Centers



Financial Product  
Administration  
for Life Insurance  
and Annuity  
Companies



Technical Support

Third Party Administrator/Business  
Processing Outsourcer

# Our Market Positioning



- **Help clients launch new annuity products faster**

Up to a third faster and at a third less cost than over-taxed internal teams and outmoded legacy systems



- **Continue to grow annuity block with new conversions**

Leverage our market leadership to grow annuity block of business



- **Invest in new Digital & Life capabilities**

Leverage capital investment and vendor echo system to build the industry disrupting “No Touch” Digital Life platform



- **Grow Life block with strategic partnerships and anchor clients**

Be selective on partnerships around Life to anchor clients and strategic partnerships

## Enhanced Quality

- Client centric culture/mindset
- Speed, accuracy, completeness
- Core process / model aligned
- Value felt by our clients

## Productivity Optimization

- Efficiency and effectiveness
- Resource management / load balancing
- End-to-end lifecycle focus and view
- Robotics/RPA & OnBase/BRE initiatives

## Technology Alignment

- Incident management
- Release management
- Intake/Delivery projects
- SE2 capital investment program

## Transformation to Target Model

- Horizontal coordination and best practice solutions
- Core process optimization via centers of excellence
- Site integration, coordination, and footprint expansion
- Dependability/reliability & scalability/sustainability

## Core Process Centers of Excellence

- Scope across all foundational disciplines and areas
- Optimized/standardized model - best practice solutions
- Associate SME development and career paths
- Subject matter expertise - teams, & associates



# Our Company

# The Realization of SE2



Could SE2 be integrated  
**SE2 Launched**  
functionality & “multi-tenancy”?



First Customer

# Our Purpose

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Service -SE<sup>2</sup>d to End

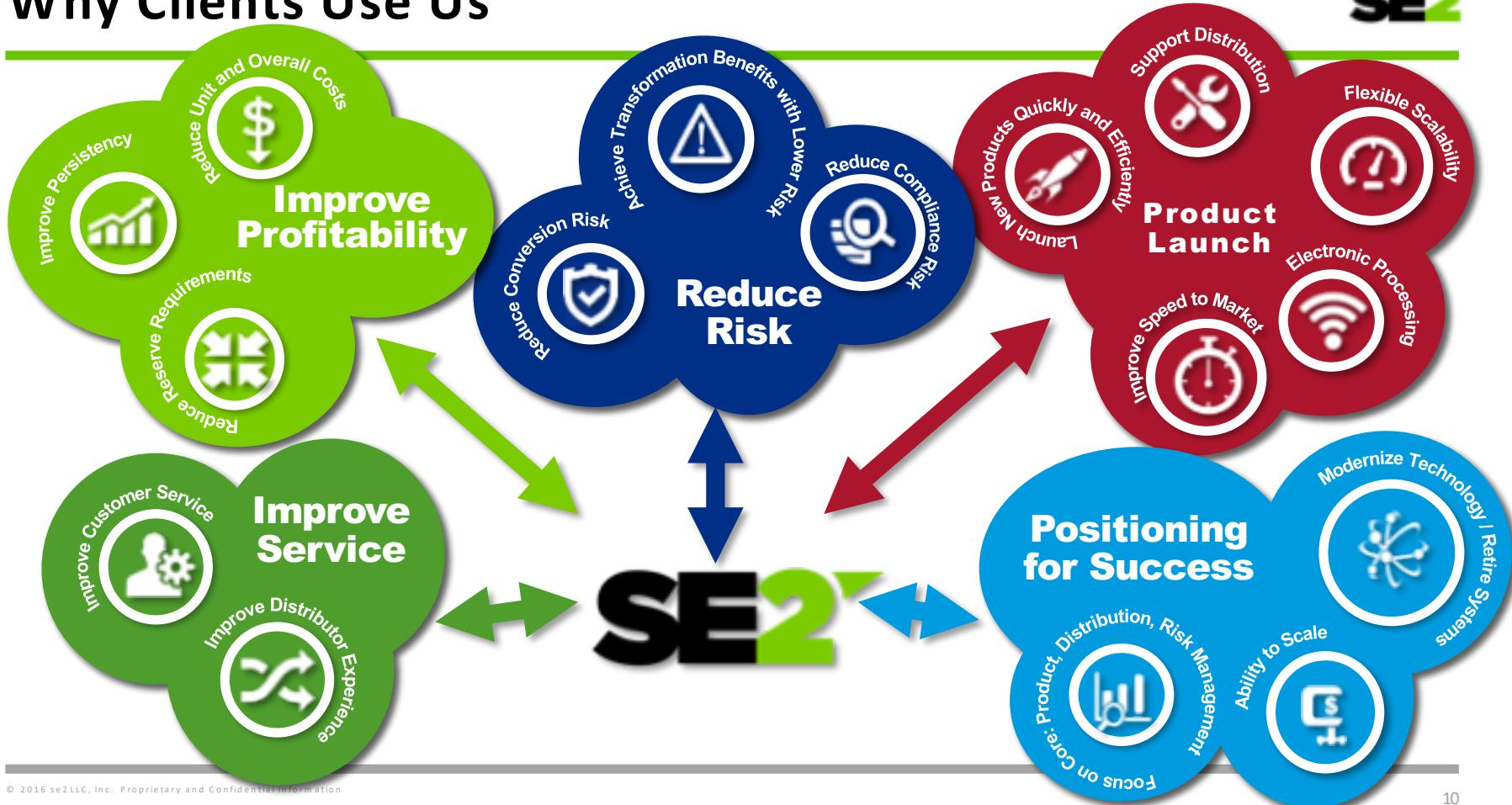
# A Rapidly Expanding List of Clients

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Representative List

# Why Clients Use Us



# SE2 Global Delivery



**Corporate  
Headquarters**



**Processing Center**

Managers

Associates

Approximately 57 Delivery Associates  
off **Three Locations**

- IT Staff Augmentation
- Disaster Recovery
- Processing Center

**NTT DATA**  
Global IT Innovator

Bridgewater, New Jersey



# Technologies

# Digital Themes and Technology Enablers Driving the Journey Towards Digital Administration at SE2



## THEMES

### Digitization

- Omni Channel
- Real Time
- Self Service
- Services / APIs

### Automation

- No / Low Touch
- Reduce Processing Time

### Analytics

- Business Insights
- User Personalization
- Next Best Action

## ENABLERS

### Additional Digital Tools & Technologies



Robotics



Rules Engine



Application  
Integration  
Network  
*MuleSoft*



Workflow



Informatica

# LifeCad Technology Stack

## Current Stack

- PowerBuilder
- C
- Visual Studio (C / C++)
- Oracle
- Windows & Solaris

## Future State Stack

- UI → Angular JS
- Java Services (Service enablement)
- JBoss
- ESB (MuleSoft / Active MQ)
- Oracle on Solaris
- Linux

The screenshot displays two windows related to the LifeCad Technology Stack:

- Desktop Application (Top Window):** A window titled "Transaction History" showing a grid of transactions with columns: Number, Date, Transaction, Receipt, Disbursement, Charge In Amt, and Account Value. The transactions listed include various financial entries such as Benefit And Auto Adj, Rate Received, Auto Acc Value Adj, and Withdrawal.
- Web-based Interface (Bottom Window):** A window titled "Policy Information (F2)" showing policy details for a specific contract. It includes sections for Policy Details (Policy Type: LTPS000000, Contract Type: Non-Qualified, Product: RS Treasury-Linked 3%, Status: Active, Issue Date: 07/18/2002), Policy Notes (F7) (with a table of messages), and Transaction Details (F5) (with a table of transactions from 12/31/2012 to 06/30/2013).



PurposeBuilt to FutureProof

# Domain

# What is Domain?



***Domain is a Practice & Community Focused on Four Key Tenants:***

1

## Be Collaborative & Efficient

Brings people together with complimentary skills to promote collaboration , generate efficiencies and leverage best practices in a specific focus area(s) to drive high quality results

2

## Be a Thought Leader

Acts at thought leaders and the "Voice of the Customer" for our external and internal clients  
(Delivery & Operations)

3

## Design Innovative & Effective Solutions

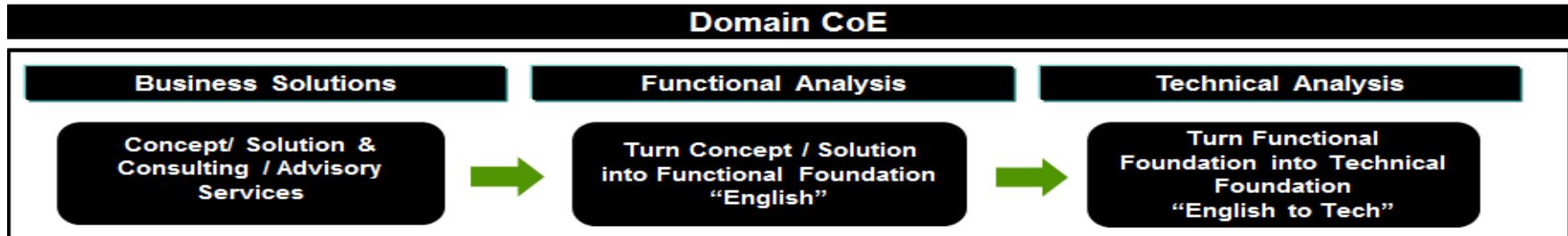
Designs effective, measurable business solutions, standards/best practices to meet client needs in collaboration with Delivery & Operations teams, external clients and with CoE and other business partners

4

## Develop a Strong Foundation to Drive Quality

Creates the right functional and technical requirements for delivery success and the ideal customer experience (carrier, distribution network and contract holder)

# Domain – Centre of Excellence – SE2



- Business Knowledge – Insurance Industry
- Knowledge of SE2 Systems, Processes, Products
- Technical Skills
- Professional Skills/ Soft Skills

# Domain Competencies



Technical	Professional Services	Organizational Skills
<u>Industry Knowledge</u>	<u>Consultative Mindset</u>	<u>Sharing Knowledge &amp; Expertise</u>
<u>SE2 Systems &amp; Processes</u>	<u>Relationship Management</u>	<u>Adaptability</u>
<u>Innovation</u>	<u>Deliverable Management</u>	<u>Interpersonal Effectiveness</u>
<u>Solution Generation</u>	<u>Quality/Excellence</u>	<u>Organizational Savvy</u>
<u>Willing Technology Explorer</u>	<u>Bridging Communication</u>	<u>Initiative</u>
		<u>Focus on Customer Satisfaction</u>

# What has SE2 ever done for me?

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- An introduction role in IT
- Training and Development
- Mentoring
- Travel
- A growing company
- Working in a multi-national, multi-site organisation all in beautiful Waterford



# Ireland Site



# Waterford Office



111 Total Associates & Managers

\*77 IT Professionals

\*30 Call & Processing

2 Finance and Admin

1 HR Manager

1 Learning & Development

\*107 Permanent Employees

\* 4 Contract Employees

# Background to the Waterford Entity



1998

2013

2015

# SE2 Ireland Roles and Purposes

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Project Management Expert

## Data Integration



Big Microsoft  
SQL Server  
operation  
  
SSIS

## Web Development



- .NET/VB/C#
- Java Script
- JQuery/Angular
- HTML 5, CSS3



# Culture and Events



# Sports and Social Events

se2



# Corporate Social Responsibility



SE2 has sponsored the following events:



We also donate thousands of euro each year to local and national charities:



# SE2 Hackathon

SE2



# Learning and Development Events



We encourage personal and professional development through:

- Lunch and Learns
- Six Sigma
- Agile
- LOMA
- Angular JS
- MS Visual Studio



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# Industry Certifications

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We work with Skillnet to source:

- Advanced SQL
- Practical Project Management
- PMP
- Certified Scrum Master



# Further Education with WIT

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SE2 works closely with WIT ensuring that modules are relevant and meet the demands of our business and ever changing technologies

Many of our employees have completed/are currently completing:

- MSc in Computing in Enterprise Software Systems
- HDip in Computer Science
- HDip in Business Systems Analysis



# For your Career and Development

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## Part Time Study Assistance Scheme

- SE2 Waterford reimburses 75% of the cost of tuition fees, and provides exam leave days for approved studies undertaken by staff under the company Part Time Study Assistance Scheme.
- To qualify for eligibility under the scheme, employees must be employed as a permanent employee and have successfully completed probation.

**(A maximum of €4,000 will be reimbursed in any three year period.)**



# QUESTIONS



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