

LEADERSHIP GUIDE

5 Questions Leadership Should Be Able to Answer Before Committing to a System Transformation

A Leadership Guide for Insurance System Transformation

A major system change is a significant business investment. These questions can help leadership consider what they expect the organization to gain from it.

1. Time for Higher-Value Work

What should your experienced people have more time to do after the transformation?

CONSIDER

- Time spent supporting systems or processes today
- Manual workarounds, reconciliations, re-keying, or repeated follow-up
- Work currently handled outside the system
- Analysis, planning, leadership, or strategic work that deserves more attention

EXPECTED OUTCOME

2. Information for Leadership

What should leadership be able to know sooner, understand more clearly, or act on with greater confidence?

CONSIDER

- Time needed to get reliable information today
- Information pulled from multiple systems or spreadsheets
- Reporting that needs manual adjustments or explanation
- Whether leadership can see what is driving a result without separate research

EXPECTED OUTCOME

Define the Business Outcomes

3. Financial & Operational Performance

Where should the organization become more efficient, accurate, or responsive after the transformation?

CONSIDER

- Processes that take longer than the business needs
- Work repeated across teams or handled manually
- Information entered more than once
- Processes dependent on spreadsheets or offline work
- Where the future environment should improve speed, consistency, or control

EXPECTED OUTCOME

4. Ability to Grow & Change

What should the organization be able to do that the current environment makes difficult?

CONSIDER

- New products, entities, markets, or business models
- Adding or changing integrations
- New reporting or data needs
- Changes in the organization, regulatory environment, or business strategy
- Technology limitations that slow or complicate change

EXPECTED OUTCOME

5. Business Risk

What dependencies or limitations should no longer create unnecessary risk for the organization?

CONSIDER

- Critical knowledge concentrated with too few people
- Information difficult to trace, validate, or explain
- Manual processes dependent on individual knowledge
- Key responsibilities that are difficult to transfer when someone leaves
- Dependencies that could disrupt financial, operational, or reporting responsibilities

EXPECTED OUTCOME

Bring the Outcomes Together

Looking Across the Outcomes

Two years after go-live, what would make leadership say the transformation delivered what the business needed?

OVERALL EXPECTED OUTCOME

Carry the Outcomes Into the Project

A complex transformation will involve hundreds of detailed decisions. Leadership does not need to make every one of them, but the people making them should understand what the organization expects the investment to accomplish.

- **VENDOR RECOMMENDATIONS**

Does the recommendation support the business outcomes leadership defined for the transformation?

- **SCOPE & PRIORITIES**

When scope changes, are the highest-value business outcomes still protected?

- **MEASURING SUCCESS**

Are the outcomes leadership defined actually showing up after go-live?

- **TRADEOFFS**

When every priority cannot be met at once, which choice best protects the outcome leadership expects?

- **PROCESS DECISIONS**

Should the current process continue into the future, or is the transformation an opportunity to change it?

THE QUESTION TO KEEP TOP OF MIND

Will the decisions we are making today get us closer to the business outcomes leadership agreed on?

Projenomics® by TAC4 Solutions helps insurance organizations connect leadership objectives, business requirements, people, systems, and project decisions from early planning through go-live.

**Planning a transformation?
Let's Talk**