

# The Integrated Enterprise

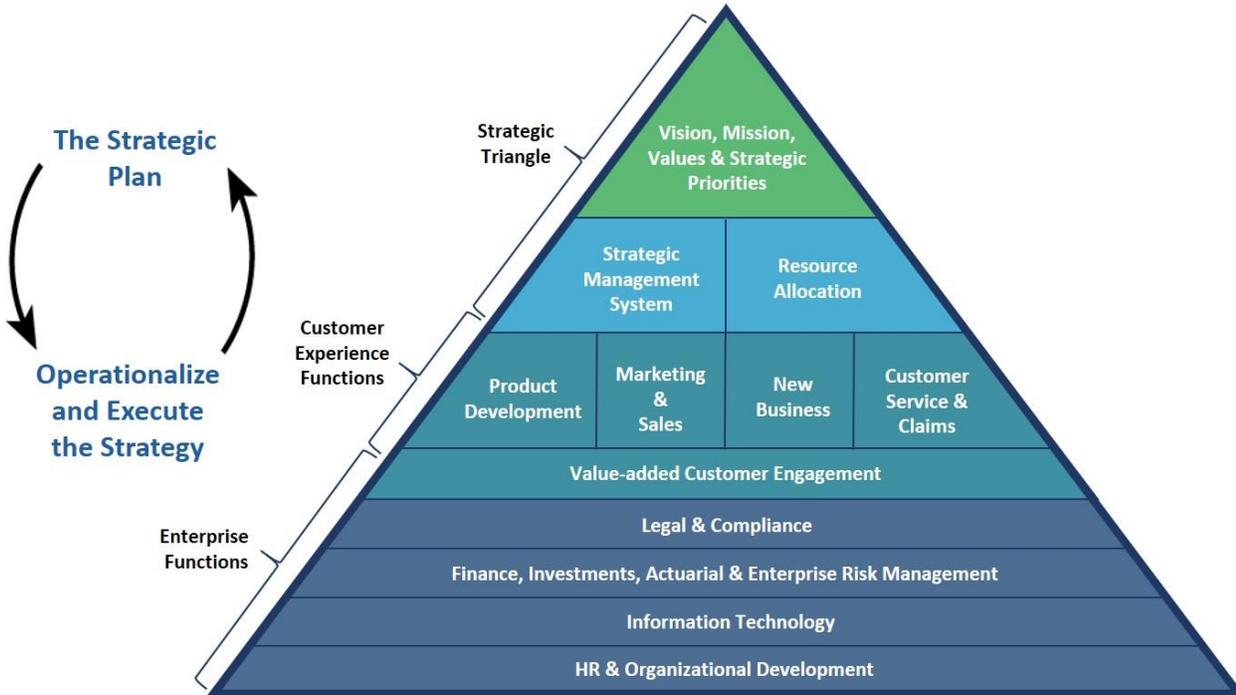
## A Strategic Framework



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## Introduction

The Integrated Enterprise Framework provides a holistic view of the relationship between a Strategic Plan and the Operational Functions necessary to achieve the goals of the strategy in a Life Insurance company. The goals of this model are to 1) Synchronize strategic goals and operational objectives; 2) Illustrate that strategy is dynamic as operational results unfold; 3) Align the organization to deliver maximum value to customers.



## The Strategic Triangle

The top three sections of the framework, **the Strategic Triangle**, is the critical link between an organization’s purpose and priorities (Vision, Mission, Values, and Strategic Priorities), its strategy (the Strategy Management System), and how it deploys resources (Resource Allocation) to effectively manage day-to-day operations while investing in strategic initiatives. The integration between the overarching strategy, the operational plan, and the allocation of human, financial and technological resources is mission-critical.

## Strategic Management System

Within the Strategic Triangle, the Strategic Management System is key to ensure that the strategy is activated and that the leaders of the organization are accountable for their roles in the achievement of the strategy. The Strategic Management System is the place where goals, objectives, measures, and strategic initiatives are defined, owned, managed, and refined on a regular basis. This enables the organization to understand how strategies connect and work together in pursuit of reaching the organization’s measurable destination and to make necessary course corrections along the way.

**Leaders** need  
accountability  
to keep  
strategic plans  
**active** and on  
target.

## Customer Experience and Enterprise Functions

A high degree of dependency exists between the Strategic Management System and the Operational Functions that are necessary to achieve the goals of the strategy. **Customer Experience Functions** are depicted to enable the organization to fully align itself with the intention of meeting the needs of target markets and delivering

maximum value throughout the full customer lifecycle. The model takes this a step further to consider how value-added services or experiences can be delivered once a consumer has become a customer.

**Enterprise Functions** play a vital role in achieving the organization’s strategic goals and also enable the Customer Experience Functions to be effective and efficient. Each Enterprise function should clearly see its role in achieving the goals set forth in the strategic plan.

### The Role of Operations and Technology Strategy

Critical to success in today’s market, is the ability to achieve strategic objectives through efficient processes designed for the customer and enabled by rapid advancements in technology and the effective use of data. A well-constructed Operations and Technology Strategy may prove beneficial in achieving these goals and helping to enable the integrated enterprise to deliver maximum value with the highest level of efficiency.



### Conclusion:

Integration between the strategic and operational plans coupled with an organization that is fully aligned with its target markets and customers has the potential to position your organization to create enduring value well into the future.

### About the Authors:



John Forbes has executive leadership experience in Fortune 50, start-up, and global non-profit organizations primarily in the health care industry. Prior to joining the Balanced Growth team, he served as the CEO or COO of the American Academy of Periodontology, the American Academy of Pediatrics and a unit of the American Red Cross’ Biomedical Services. His professional experience includes leadership roles with Northfield Laboratories, Baxter International, and Procter and Gamble.



Jason M. Bordui is the Founder and President of Balanced Growth Consulting with 30 years of leadership in the Insurance, Financial Services, and Healthcare sectors. He focuses on Strategy, Innovation, and Operational Excellence to achieve far-reaching results for dozens of clients. Jason differentiates his consulting services by delivering results with a balanced focus on customer value, revenue growth, productivity improvement, cost savings, and organizational excellence.

*Balanced Growth Consulting specializes in Strategy, Innovation, and Operational Excellence in the Insurance, Financial Services, and Healthcare sectors. Our mission is to create enduring value for organizations who are driven by both purpose and profit through strategic and operational innovation. In collaboration with client leaders and teams, we design, implement, and accelerate high-impact strategic, operational, technology, and innovation initiatives. Our experience and objectivity make Balanced Growth a strong partner to help drive your project’s success.*