



# SUMMARY OF QUALIFICATIONS

*The passion to envision a brighter future.*







# ABOUT BG

*The mission of Balanced Growth Consulting is to create enduring value for organizations that are driven by purpose and profit. To fulfill this mission, BG specializes in strategy, operations and innovation in the Insurance, Financial Services and Healthcare sectors. We pride ourselves on collaboration with client leaders and teams. Together we design, implement and accelerate high-impact strategic, operational, technology and innovation initiatives.*





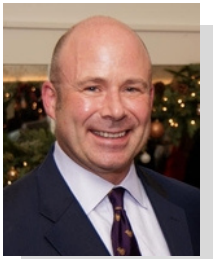
# AT A GLANCE

17  
*years in business*

150+  
*Successful Projects*

100%  
*Client Satisfaction*

"Balanced Growth was founded for the sole purpose of creating value for our clients. We are honored to work alongside leaders and teams who are committed to envisioning and achieving a compelling future."



Jason M. Bordui, President and Founder  
Balanced Growth Consulting



# MEET THE LEADERSHIP TEAM



**JASON M. BORDUI**  
*President & Founder*



**JOHN FORBES**  
*Principal & Strategic  
Planning Leader*



**VICKI SUTTER**  
*Principal*



**AMY MURRIN**  
*Senior Manager*



**LESLIE BRANDOW**  
*Marketing & Communications*



# JASON BORDUI'S BIOGRAPY



**JASON M. BORDUI**

*President & Founder*

- Founded Balanced Growth Consulting in 2005 in Chicago, IL
- Previously, Managing Director / Senior Vice President, Keane Consulting (now NTT Data)
- Award-winning service with 30 years in Management Consulting
- Expertise includes: Operations & Technology Strategy, Strategic Planning, Board and Executive Facilitation, Business Process Design, Organizational Development, Strategic Program Leadership, Service & Digital Innovation and New Venture Strategy
- Clients include: Allianz Life, American Academy of Pediatrics, American Academy of Periodontology, American Dental Association, American Enterprise Group, American Enterprise Ventures, Amerigroup, Aon Corporation, Baker Hughes, BCBS South Carolina, BetterLife, Catholic Financial Life, Catholic Order of Foresters, Catholic United Financial, Chubb Insurance, CNA Financial, Conventus, FCSLA Life, Florida Blue, GBU Life, Great American Insurance, Kemper, Information Resources, Modern Woodmen, National Institutes of Health, Phonak, Prudential, Security Benefit, SE2 and State Street
- B.S. in Finance & Marketing from Indiana University with Honors and Distinction; International Studies at University of Cambridge (England)
- Lives in Crown Point, IN with his wife (Penny) and children (Conrad and Brinna)



# WHAT WE DO - SERVICES



## STRATEGIC PLANNING

Put a laser focus on future goals and develop cohesive strategies supported by practical plans to achieve these goals. Create internal alignment, navigate competing priorities and build organizational momentum to position your organization for the future.



## OPERATIONS & TECHNOLOGY

Holistically improve processes that are informed by data, enabled by technology, and supported by high-performing teams. The goal is to enhance customer experiences while driving operational excellence and lowering costs in your organization.



## INNOVATION

Uncover fresh ways to create value, meet customer needs and form a new cultural mindset during today's digital renaissance. These goals are achieved through designing and deploying new solutions and commercializing adjacent business opportunities.



## IMPLEMENTATION

Reduce risk while accelerating high-impact initiatives to meet your strategic objectives. Services include Business Process Design, Technology Solution Design, Technology Selection, Organization Design, Strategic Program Management, Project Management and Advisory Services.



# MEET OUR CLIENTS

INDUSTRY FOCUS:

Insurance



Financial Services



Healthcare





# CLIENT EXPERIENCES

## CLIENT

## ENGAGEMENT/OUTCOME



- Created an **Operations & Technology Strategy** to improve service and handle increasing volumes while lower operating costs by 25%.
- Devised a strategy to enhance profitability and **maximize the valuation of AEG's Agency** - American Republic Insurance
- Led the implementation of a new **Digital Customer Portal** for desktop, laptop, and mobile to enable customer self-service.
- Developed the **Strategic Plan** and **managed the implementation of the innovation and Corporate Venture Capital** arm of AEG called American Enterprise Ventures (AEV).
- Facilitated the Strategic Framework with the Executive Team and Board for **Evaluating Partnerships and Acquisitions**.



- Co-led a **Strategic and Operational Plan** to take the national processing platform to the next level of growth, service, and scalability.
- Using a best practices model, delivered a vision for a **Center of Excellence** to serve employer groups and other partner plans. Facilitated this process with the largest client to address their targeted needs and growth objectives in the marketplace.



- Developed and implemented an enterprise-wide **Operations and Technology Strategy** that improved services while dramatically lowering costs.
- The resulting platform led to the creation of the **Business Plan and Formation of SE2**, now a leading third-party administration in the life and annuity marketplace. SE2 renamed to Zinnia in September 2022.





# CLIENT EXPERIENCES

*Representation of how BG has impacted these Fraternal Organizations:*





CLIENT	ENGAGEMENT/OUTCOME
	<ul style="list-style-type: none"><li>• Developed an <b>Operations &amp; Technology Strategy</b> to fortify infrastructure and enable growth. Planned the <b>Organizational Transformation</b> of the IT Department.</li><li>• <b>Vendor Selection Leadership</b> for multiple new technologies including end-to-end New Business, Customer Relationship Management (CRM), Workflow and Robotic Process Automation (RPA) tools</li><li>• <b>Program Management and Implementation Leadership</b> for a <b>Digital Transformation</b></li><li>• Best Practices framework and <b>Project Management</b> disciplines for a <b>Product Portfolio Refresh</b></li><li>• Work collaboratively with the Executive Team to present progress and future plans to the GBU Life Board of Directors on a periodic basis</li></ul>
  	<ul style="list-style-type: none"><li>• Created the <b>Business Strategy</b> to enable distinct Go-To-Market Strategies while sharing investments in technology and back-office processing leading to the formation of an industry-first <b>Joint Venture</b> called Conventus Now.</li></ul>





# CLIENT EXPERIENCES

*Representation of how BG has impacted these Fraternal Organizations:*

CLIENT	ENGAGEMENT/OUTCOME
 A different kind of life insurance company	<ul style="list-style-type: none"><li>• Developed a 5-year <b>Strategic Plan</b> with the Board and Management that was approved by the Board in August 2021.</li><li>• Led the envisioning of the <b>digital transformation</b> process for BetterLife starting with future state definition for New Business inclusive of Illustration, Electronic Application, Underwriting, Electronic Policy Delivery and Electronic Signature.</li></ul>
	<ul style="list-style-type: none"><li>• Facilitated the development of the 7 to 10 year vision including the <b>Strategic Plan</b> that was approved by the Board in March 2022.</li><li>• Working collaboratively with FCSLA Life on the deployment of the Strategic Plan.</li></ul>
	<ul style="list-style-type: none"><li>• Facilitated a three-day <b>Strategic Planning Retreat</b> with the Board resulting in an enterprise SWOT, vision statements, and alignment of strategic priorities. Conducted interviews with each board member and summarized findings a part of retreat preparation.</li></ul>
	<ul style="list-style-type: none"><li>• Led the <b>Enterprise Architecture and Enterprise Program Management</b> in support of a transformational initiative.</li><li>• Designed metrics system to maintain service levels for potential mergers.</li></ul>





# CLIENT EXPERIENCES

## CLIENT

## ENGAGEMENT/OUTCOME

American Academy  
of Pediatrics



- Led the **Business Strategy** and the **design, development, implementation** of the award-winning consumer platform: [www.healthychildren.org](http://www.healthychildren.org).
- Led the **Strategic Planning** and the **design, development, and implementation** of the centralized e-commerce capability to sell all AAP products in a single front-end: [www.shopaap.org](http://www.shopaap.org).



American  
Venous Forum

- Serving as Executive Director to guide the organization in a **growth mode** after leading through a **turnaround and stabilization period** for this society.
- Led the **Strategic Planning** process with the board and key leaders to devise the strategy of the future.
- Provide **ongoing services** to support the operational needs of the organization.



- **Evaluated numerous commercial concepts** for the for-profit subsidiary of the ADA including process management and the application of new technology.



American Academy of Periodontology

- Led the development and management of the **Strategic Plan** for this dental specialty organization.
- Devised an **Innovation Strategy** and improved the strategic approach and processes for corporate business development.





# VOICE OF OUR CLIENTS

*A research effort funded by Balanced Growth generated important feedback from our clients. The word cloud captured the essence of what clients say about our firm.*



**Dave Keith**  
President  
AEG Insurance Solutions





# VOICE OF OUR CLIENTS

"The success of the HealthyChildren.org exceeded our most far-reaching expectations. We thank Balanced Growth for the instrumental role they played in envisioning the strategy and leading the implementation of HealthyChildren.org. The BG team was as passionate about the success of this initiative as we were."



Mark Del Monte, JD CEO/Executive Vice President

"Innovation is the unrelenting drive to break the status quo and develop a 'NEW' where few have dared to go. Balanced Growth helped AEG see beyond our current boundaries."



Julie Pearce, Vice President at American Enterprise Ventures

"Balanced Growth's rigorous process, knowledge of the most prominent providers of financial services systems and experience with strategic initiatives brought sage advice to our leadership."



Mike Ahles, President, CEO of Catholic United Financial

"Through the talents and resolution of Balanced Growth, we pulled through a difficult transition and emerged as a viable, growing and healthy professional medical society. BG was instrumental in helping us build our current hybrid administrative model. Up to this point, there were almost no similarly structured operating models in the United States."



Elna Masuda, M. D. President, AVF

"The Balanced Growth team was invaluable in the joint venture and platform vendor evaluation process. They brought structure, expertise and industry knowledge to our efforts that resulted in a better outcome than we could have achieved alone."



Jeff Piotrowski, Managing Director at Conventus NOW

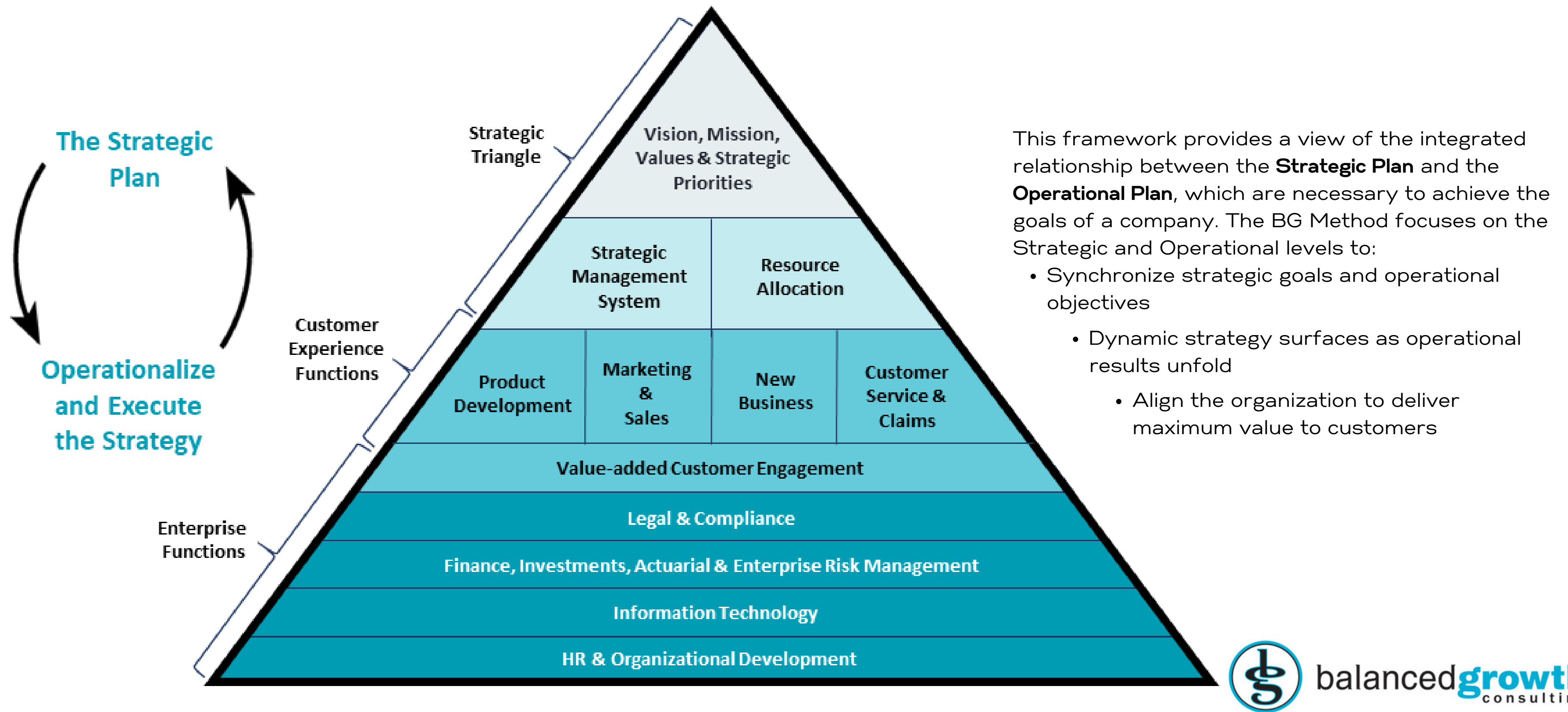
"Balanced Growth has helped AEV make huge strides by accelerating our strategic goals, key initiatives, best practices, and guiding principles."



Julie Larson, Technology & Innovation Officer at AEV



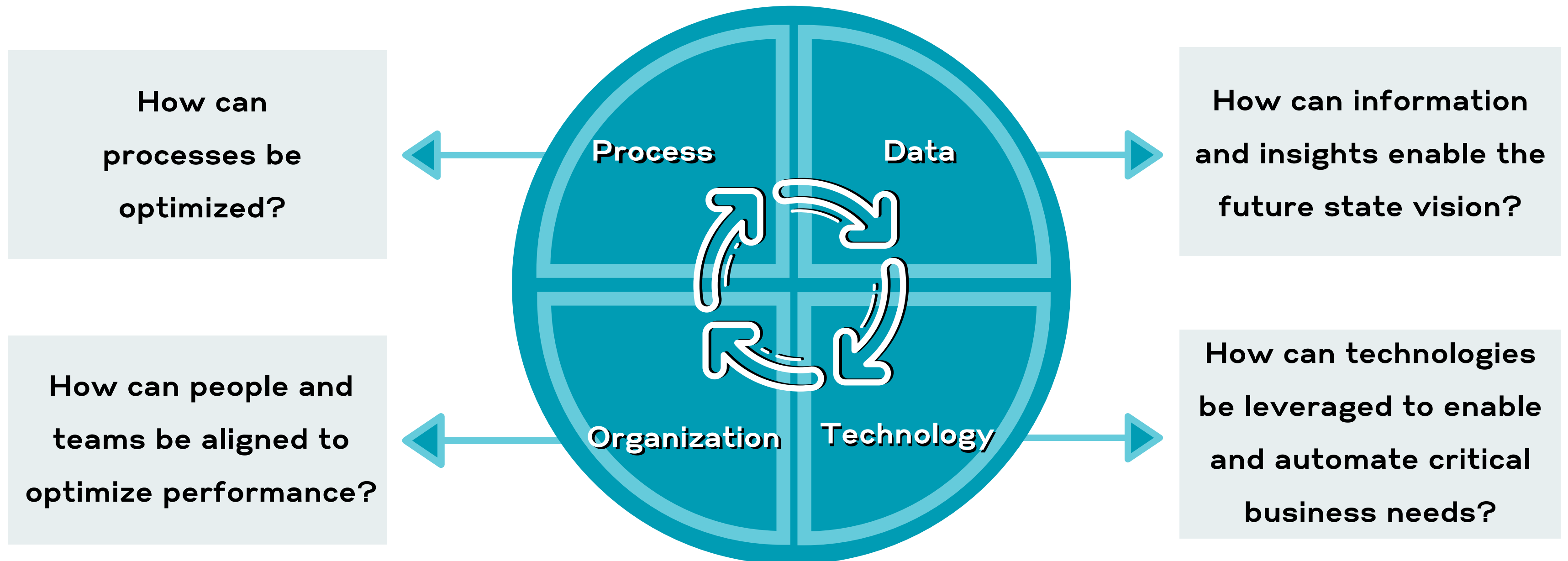
# BG METHOD - STRATEGIC AND OPERATIONAL PLANNING





# BG METHOD - HOLISTIC VIEW OF OPERATIONAL STRATEGY

*Ideally, **efficient processes** are **informed by data**, **enabled by technology**, and **supported by high-performing teams of people**.*





# INDUSTRY INVESTMENT

*The BG Executive Roundtable provides continuing connectivity with our clients*



## EXECUTIVE ROUNDTABLE

Balanced Growth provides a unique opportunity for our client executives to connect with other industry leaders.

- Our annual flagship event for insurance and financial services client executives, typically held in-person in Chicago.
- Roundtable events attended by a dozen companies and 19 senior executives and 5 CEO's.
- Agenda topics featured: Strategic Planning & Partnerships, Innovation and InsureTech Insights, and Operational Excellence Enabled by Technology.





# INDUSTRY INVESTMENT AND CONNECTIVITY

## *Industry Collaborations:*

AFA Associate Member and Gold Sponsor of 2022 Executive Summit; ACLI member and sponsor of Forum 500; participant in LOMA's Life Insurers Council.



## *Innovation Community Connectivity:*





# THE BG VALUE PROMISE



*"Our success is ultimately measured by the achievements of our clients."*

Jason M. Bordui, President & Founder of Balanced Growth

*As our client, you can expect the following from the Blanced Growth team in everything we do:*

1

**A relentless focus on value creation enabled by strategy, innovation and operational excellence.**

2

**Experts in developing and deploying strategies that are far-reaching and practical.**

3

**The ability to consistently achieve business objectives via integrated strategies and to work with our clients to manage the successful attainment of results.**

4

**A highly collaborative style with a consistent record of 100% client satisfaction.**

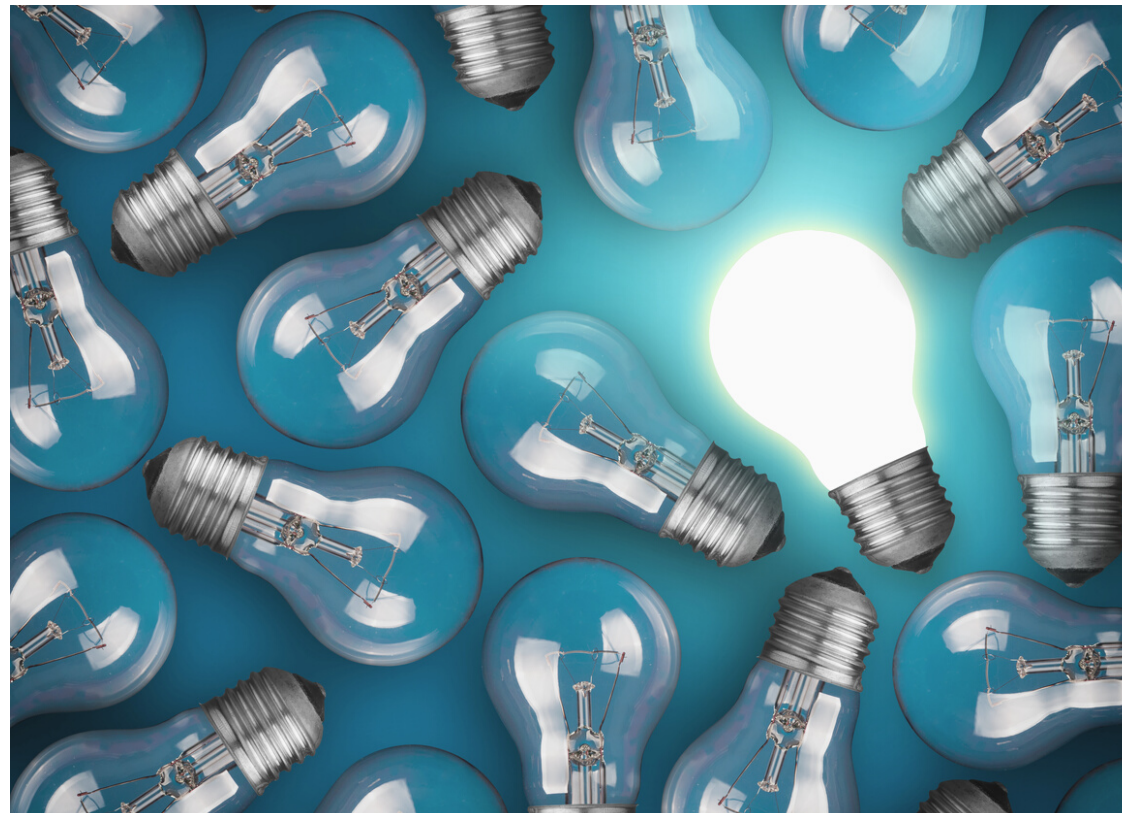


# WORKING TOGETHER FOR A BRIGHTER FUTURE



*The passion to envision  
a brighter future and  
the commitment to  
make it a reality.*

*The insight to design  
a comprehensive  
strategy to achieve  
your objectives.*



*The collaboration to  
bring ideas into  
existence and to  
achieve enduring  
results together.*



# CONTACT US



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