

Lockton Employee Benefits Journey





Isfi Deendar

VP, Business Information
Lockton

Lockton EB Journey

salesforce



Where we are today

Source of truth is 'associate centered'

Fragmented systems:

- Vertafore
- Doc mgmt, Content gen
- Analytics apps
- Consulting apps



Where we want to be...

Source of truth is 'system centered'

Connected systems

- FSC+
- Auto-ingestion
- Intelligence
- Customer Portals

Key Considerations

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Culture

Strategy & Execution
Preserve uniqueness
Change Management



Data

Consistency
Accuracy
Integration strategy



Auto-Ingestion

Options abound
Evolving rapidly
Human in the loop



SF Org Strategy

Sales Cloud
FSC
Experience Cloud?

Future State

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Benchmarking

Dynamic
Across all LOBs
More data points



Automation

Minimize Manual
No Duplication
Minimize E&O



Scalability

Client growth
Pivot easily
Fluid data access



Innovation

New data capture
New Insights
Expanded Services