

# Cheese and Change: The Art of Meeting People Where They Are

*How a pizza analogy ignited a data-driven transformation*

# About Mutual of Omaha

## Our Mission

We help our customers protect what they care about and achieve their financial goals.

Mutual of Omaha's  
**WILD KINGDOM**



## Workplace Solutions

- Group Life
- Short-Term Disability
- Long-Term Disability
- Dental, Vision
- Accident
- Critical Illness
- Hospital Indemnity
- Paid Family Medical Leave
- Employee Assistance Program

## Financial Solutions

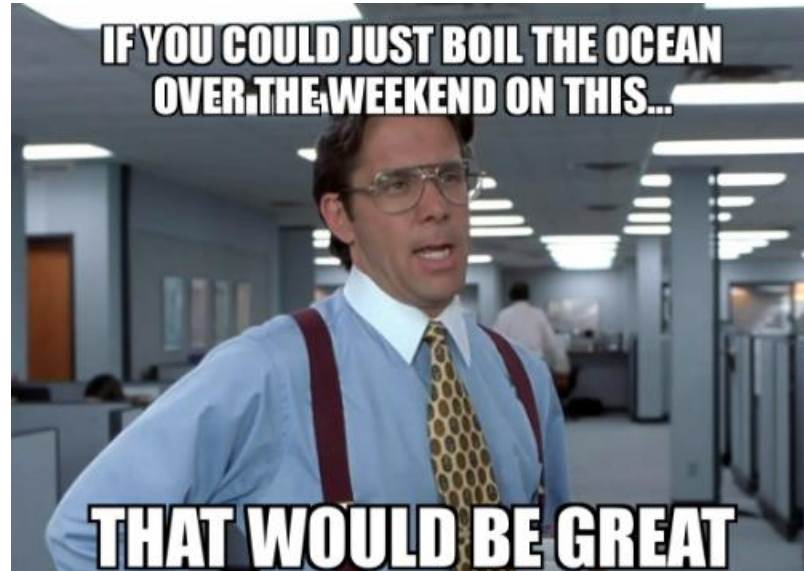
- Indexed Universal Life
- Term Life
- Disability Income
- Long-Term Care
- Accidental Death
- Traditional Mortgage
- Reverse Mortgage
- Pension Risk Transfer
- Structured Settlements
- Special Risk

## Senior Solutions

- Medicare Supplement (Medigap)
- Senior Dental and Vision
- Medicare Advantage
- Final Expense Life Insurance

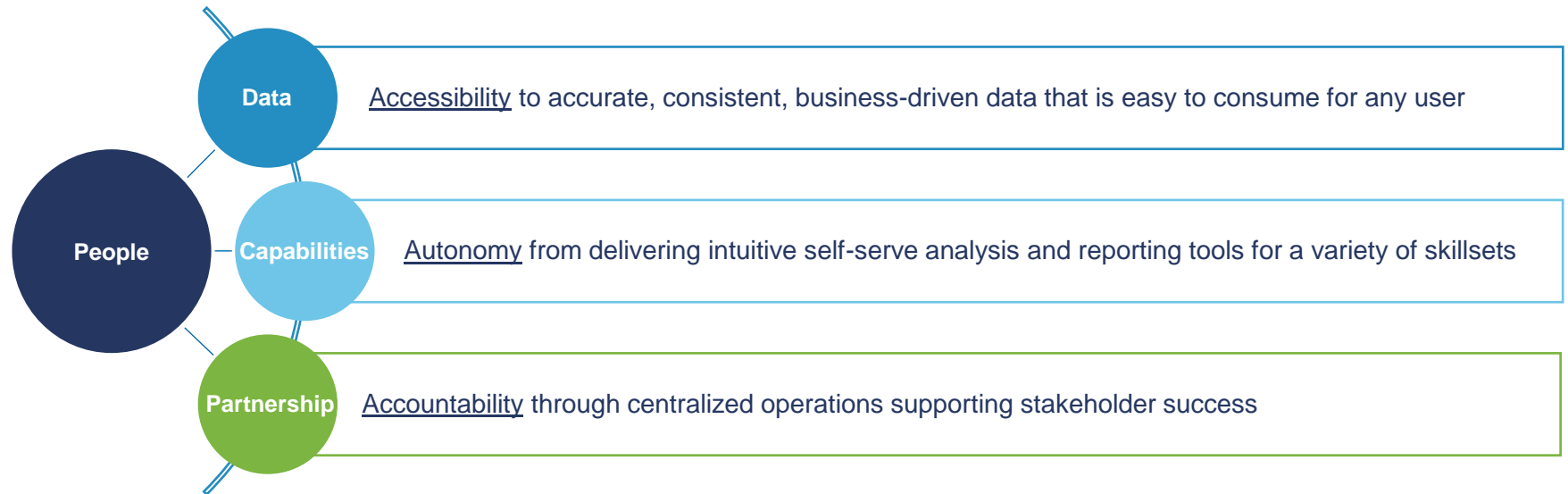


# You Gotta Start Somewhere...

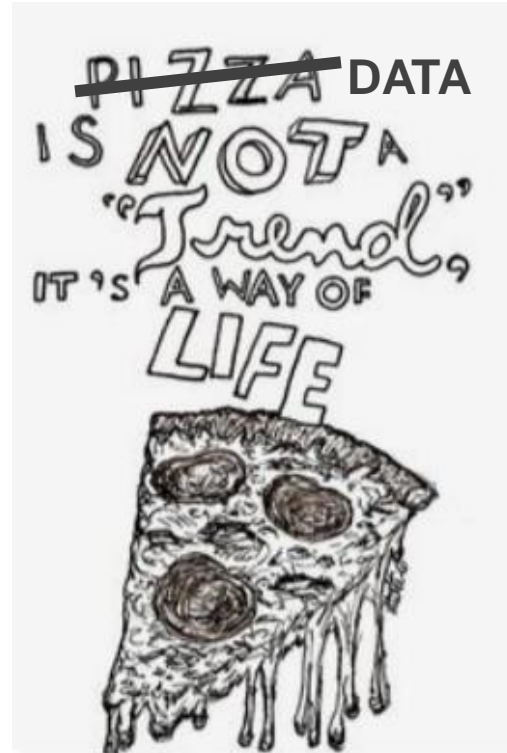


# Financial Data Strategy: Vision 1.0

Deliver a consumption-focused data strategy that empowers stakeholders, reduces risk, and enables efficient and effective execution of financial data activities through:

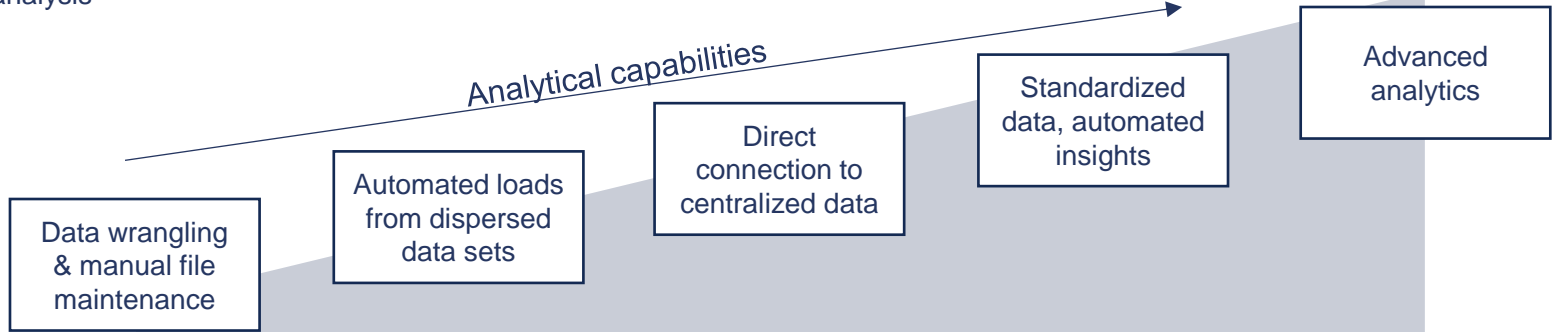


# The Pizza Analogy



# Our Analytical Journey

% time spent on analysis

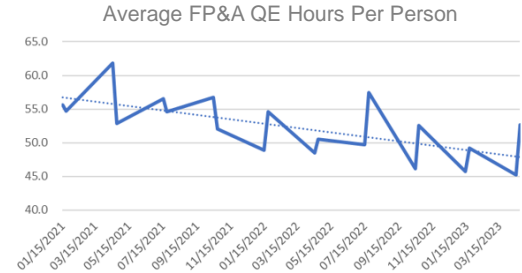


	The Olden Days (2018)	2019	2021	2024	Beyond
<b>Tool</b>	BOE, Excel	Power Query / Pivot	SSAS (POC)	SSAS (Prod)	?
<b>Volume Ability</b>	< 1M rows	~10M rows	> 100M rows	> 3B rows	To infinity and beyond
<b>Validation Effort</b>	High	Medium	Low	Low	None
<b>Standardization</b>	None	Somewhat	Mostly	Mostly	Fully
<b>Ease of Sharing</b>	Hard	Moderate	Easy	Easy	Instantaneous
	Improved User Experience...		Improved Productivity...		Improved Analytics...

# Success Tastes as Good as [Chicago deep dish with pepperoni and jalapeños] Pizza

## 2023 SSF Benefit Assessment

- Average annualized efficiencies of \$24k per user
- Saved 800 hours creating new ASAP Income Statements
- Collapsed number of existing reports by 50%
- Previously unavailable analytic capabilities
- Improved QE data currency + employee experience
- OpX driven resource transition to support data strategy



“You’d have to pry it from my cold, dead fingers now.”

“This project wouldn’t be possible without SSF.”

“Bless your soul, SSF.”

“SSF is so frickin’ slick... the more I use it, the more I love it.”

“I love SSF!”

...real life user quotes (I didn’t make these up, I swear!)

## Fun Facts

- 1 in 10 employees use one of our dashboards
- The CEO proactively engages with SSF during meetings to probe into areas and ask questions... need I say more

# What's Next? – Revisiting Our Purpose



## Why do we exist?

Empower financial data consumers with easy access to trusted data

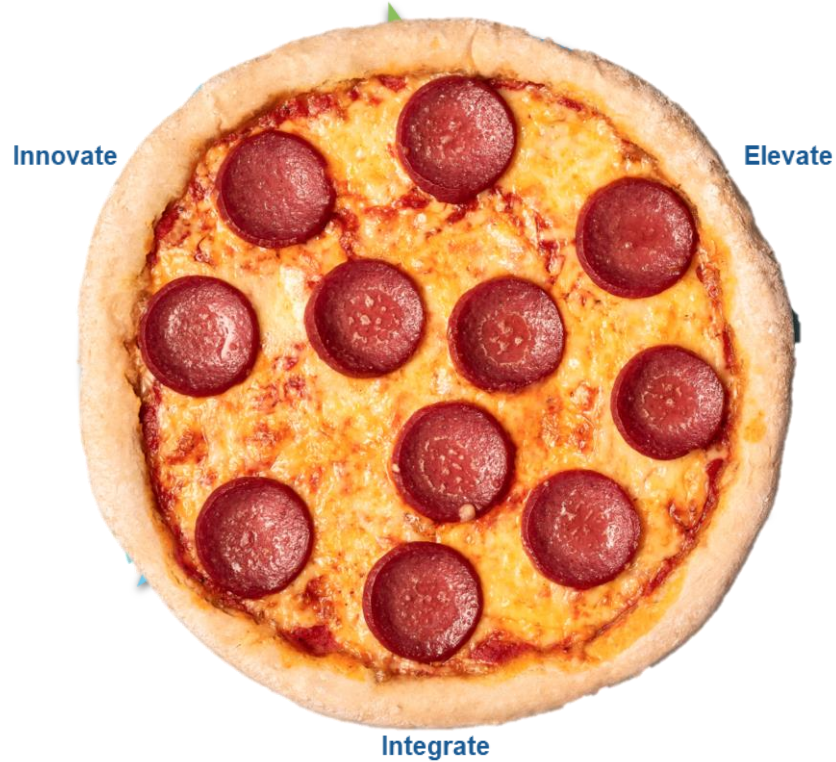


## What do we do?

Transform our stakeholders' relationship with data through innovative capabilities and practical guidance



# Financial Data Strategy: Vision 2.0



*Embrace the Kinetic Lifecycle of Data*

# Jeannie's Pro Tips

DO...	<b><i>Get real with your scope</i></b>	Taking on too much too soon hinders progress; commit to the areas where “needed” and “achievable” overlap
	<b><i>Stick to your guns</i></b>	You chose your path for a reason; articulate why and go execute
	<b><i>Know when to evolve</i></b>	Change is slow (if change is fast and easy at your organization, please keep it to yourself); plan early for what's next
DON'T...	<b><i>Be too fancy</i></b>	Meet people where they are; keep your strategy and messaging approachable, engaging, and easy to understand
	<b><i>Get distracted</i></b>	Scope creep or material changes in direction diminish impact; regularly revisit your strategy to stay on track
	<b><i>Rush</i></b>	Recognize constructive vs. destructive discomfort; if it doesn't feel right, it isn't time