# Innovation Challenge: Finalist Pitch Deck

Josh Everett, Vice President Strategic Partnerships & Innovation
John Garcia, Strategic Partnership & Innovation Intern
Dan Volk, Strategic Partnership & Innovation Intern

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Congratulations!  You have made the finalist down-select!

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# Associate engagement – We are spreading the culture of innovation across Ameritas

**125** Idea submissions

**109** Ideas advanced to Semi-Final judging

**34** Ideas advanced to Semi-Finalist round

**22** Ideas submitted executive overview to make top 5

**5** Semi-finalist list is currently being drawn down to top 5

**14** Teams created

**12** Associates/Teams submitted more than one

**100** Associates Submitted/Involved in an idea

**42** Associates Involved in semi-finals

**23** Associates Involved in semi-finals

*Within a couple of days, an article will hit Inside Ameritas with all Finalist information

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# The Pitch

| Winner / Runner Up Selection | ALA Blue Sky Team will be In attendance | Details |
|---|---|---|

The innovation growth board will determine the Grand prize winner and runner-up's during the May 6th Growth Board Meeting

**Growth Board**
- Bruce Mieth
- Rob Sharp
- Brent Korte
- Shreejit Nair
- Jennifer Kelly
- Nicholle Taylor
- Joe Lionberger
- Cassie Muilenburg
- Jennie Prussa
- Ann Frohman
- Thomas Knapp (Advisor)

Legend: Ameritas | Other

The ALA Blue Sky Team from 2018 and the Innovation Lab Team will be in the room.

**ALA Blue Sky + Innovation Lab**
- Chuck Huetter
- Mike Gatliff
- Tabatha Regler
- Andrew Rinn
- Thomas Fink
- Jason Summers
- Josh Everett
- Dan Volk
- John Garcia

**Date:** May 6th
**Time:** 1:30 – 5pm
**Location:**
- Lincoln - Ground Floor West
- Cinci - Conference Center Room 2
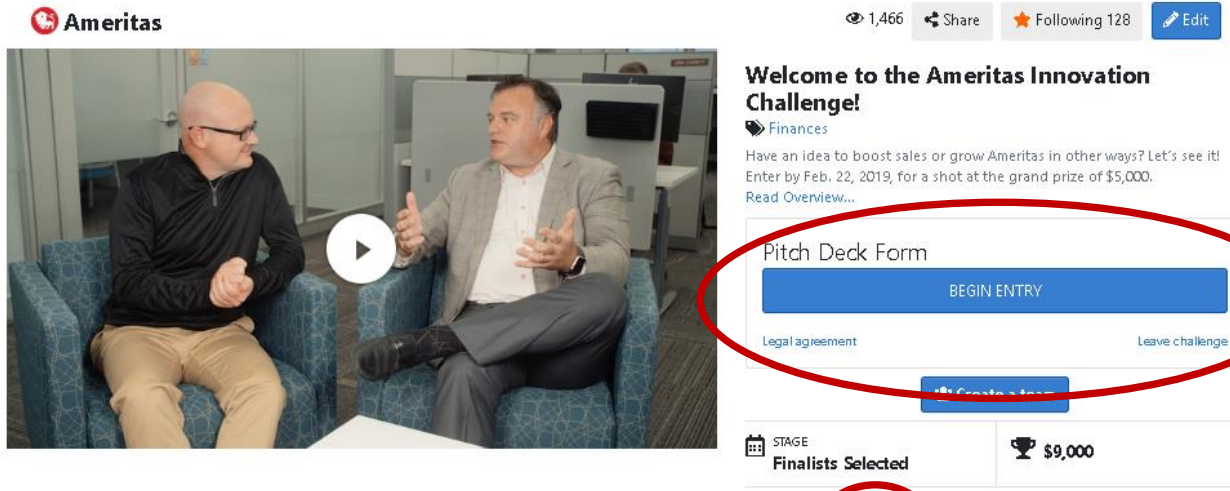
**Invite:** Outlook invite coming within a day
**Documentation:**
- Growth Board has copies of your Executive Overview document today
- Submit your pitch deck through Hero-X
- 5/3 @ 7:00pm CST they will be delivered to the GB

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# Pitch Deck Details
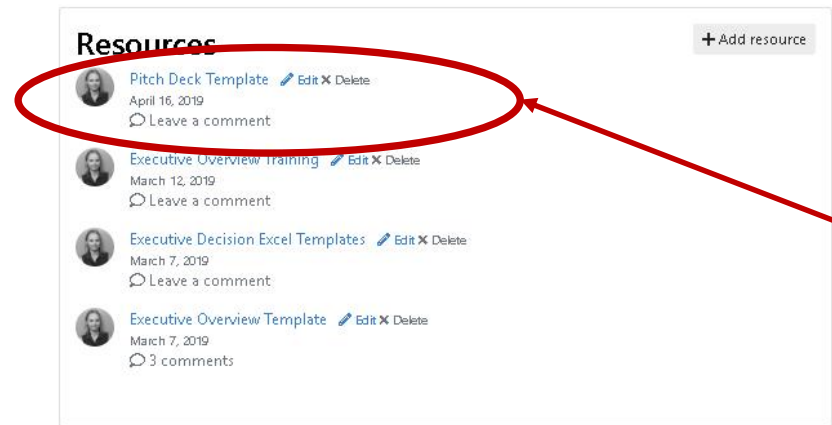


As with the last 2 rounds, you will need to submit your pitch deck via Hero-X "Begin Entry". Make sure to name your entry the same.

The pitch deck template is on the resources tab within Hero-X

The pitch deck template

# Pitch Deck Overview

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# Considerations for the Innovators

- **Goals of the pitch deck:**
  - Articulate your idea amazing idea.
  - Gain confidence from the Growth Board on the ability to generate growth and the path to execute next steps.
  - Generate well-informed questions from the Growth Board.
  - Be clear on the actionable next steps and the path forward.
- **Considerations**
  - Each team will have <u>a maximum of 12 minutes</u> for your pitch and 8 minutes for questions from the Growth Board.  (Timing adjustments may occur if any entries drop).
  - There is a likelihood that people on the Growth Board may not know the space / subject as well as you do.  Make sure you set the stage to give information to help better understand the space.
  - The pitch deck template is only a template.  I strongly encourage you to adjust, add, delete, etc to make the pitch details pertinent and relevant to your idea.
  - Be prepared to pitch on May 6th.  You should rehearse and fine tune so that you can put your best foot forward.  All your work to date leads up to this final pitch opportunity.
  - Be prepared for questions.  They will ask questions.
- **Other Thoughts:**
  - Ideas may be morphed prior to execution by Innovation Growth Board to better align with enterprise.  Please be open to that conversation.
  - If you do not feel comfortable pitching to the growth board, let's talk about some options.
  - The Innovation lab will have 1-3pm CST available through May 3rd to provide consulting, insights and support.
  - If you need anything, please reach out to Josh Everett, John Garcia or Daniel Volk.
  - Don't worry about creating the most beautiful pitch deck, be focused on presenting your winning idea and articulating it in a fashion to gain support

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# <Name of Idea>

<Short Description of Idea>

<Team Name/Innovator Name(s)>

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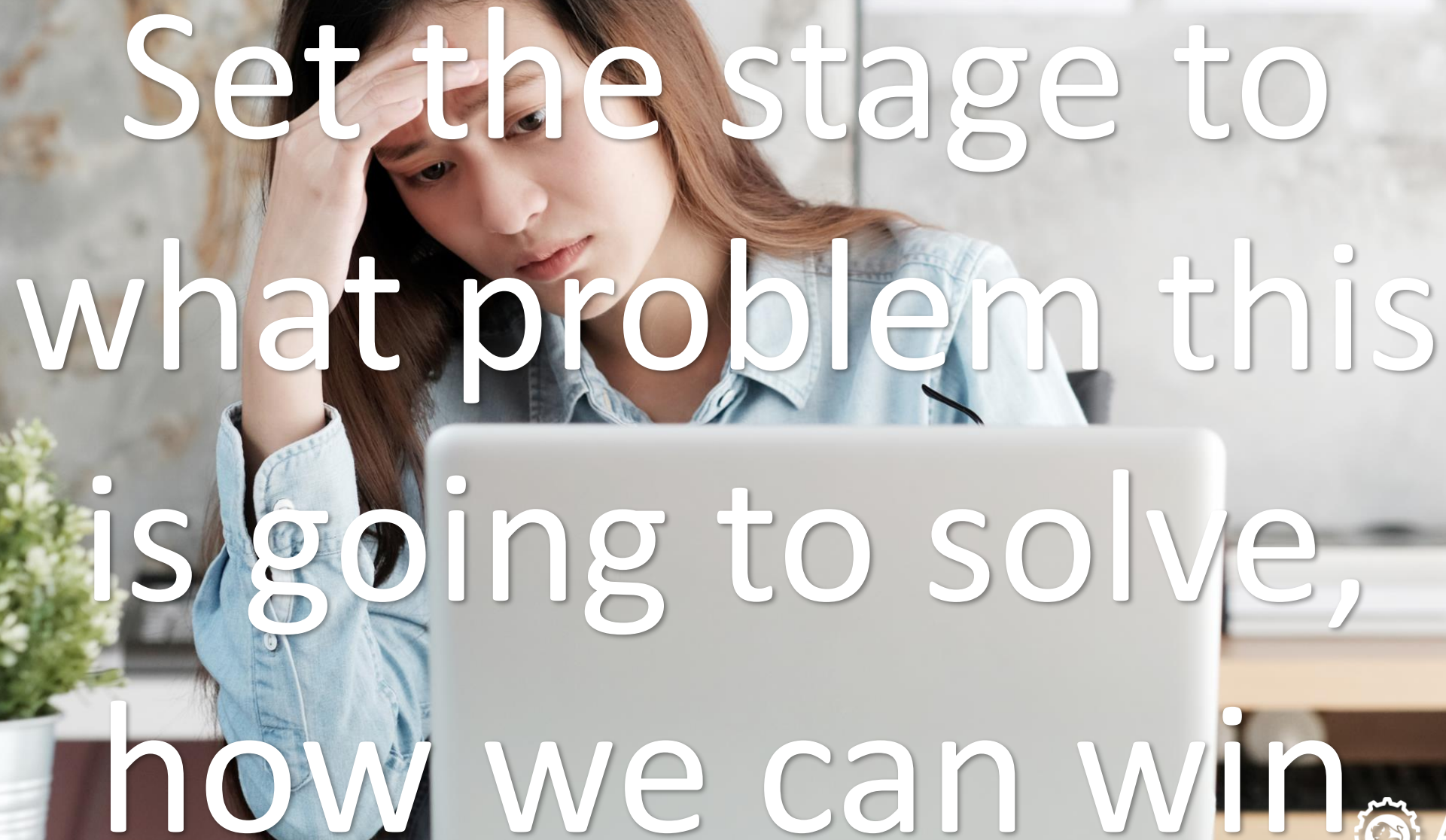
Set the stage to make your idea real for the audience

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Set the stage to what problem this is going to solve, how we can win

For internal audience only.

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# The Problem: <Problem your idea will solve>

**Problem #1**

**Problem #2**

**Problem #3**

**Problem #4**

**Problem #5**

Describe problem #1 and how addressing it creates positive impact; leverage to tell why we should execute on this idea

Describe problem #2 and how addressing it creates positive impact; leverage to tell why we should execute on this idea

Describe problem #3 and how addressing it creates positive impact; leverage to tell why we should execute on this idea

Describe problem #4 and how addressing it creates positive impact; leverage to tell why we should execute on this idea

Describe problem #5 and how addressing it creates positive impact; leverage to tell why we should execute on this idea

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# Outcomes / how we win / how agents win / how consumers win

What are the potential outcomes?

What happens if this goes badly?

What happens if this goes really well?

Describe the outcomes that apply to consumers.

Describe the outcomes that apply to agents/brokers.

Describe the outcomes that apply to Ameritas.

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# Did You Know?

- Use this page to talk about top reasons your idea is prevalent in todays market

- This can be similar information to your Solution Overview from your Executive Overview document

- Use this slide to portray key stats or insights that make your idea appealing to execute

- If other competitors or business models have done something like this, introduce the info to describe what the potential is

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# Solution:

<Insert your solution>
<Briefly describe your solution>
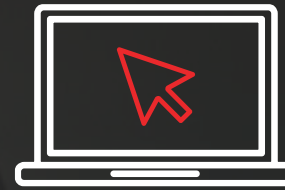
**Communicate**

Text to describe

**Engage**

Text to describe

**Win**

Text to describe

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# The How: <How will your idea be brought to market>

<Brief description about how your idea will be implemented>

**Tested & proven**

<how your idea has worked elsewhere>

**Engagement**

<how will you get your idea off the ground with agents/customers/etc>

**Success**

<What is Ameritas getting out of this>

**Growth**

<Other advantages to your proposed idea>

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# Assumptions Map

- Key Assumptions:
  - A

  - B

  - C

  - D

**1** Desirable – Do they want this?

D1
D2
D3
D4
D5

**2** Feasible – Can we do this?

F1
F2
F3
F4
F5
F6

**3** Viable – Should we do this?

V1
V2
V3
V4
V5

**Important**

Plan | Evaluate

**Known** ———————— **Unknown**

Ignore | Defer

**Unimportant**
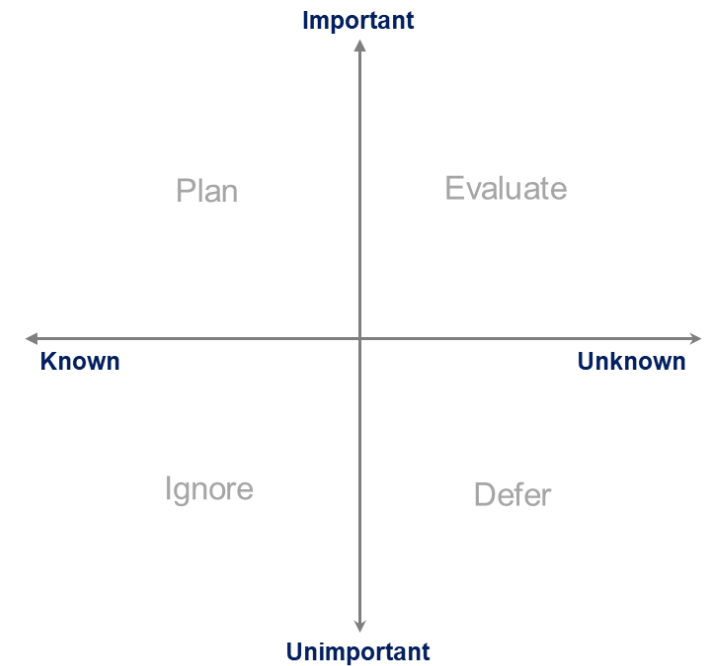
# Risks & Mitigations

- Most Significant Risks:
  - A

  - B

  - C

  - D

| Category | Risk | Mitigation | Pre-Mitigation Risk | Post-Mitigation Risk |
|---|---|---|---|---|
| Financial Risk | | | 🟢 | 🟢 |
| Business Continuity Risk | | | 🟡 | 🟢 |
| Vendor Organizational Risk | | | 🔴 | 🟡 |
| Information Security Risk | | | 🔴 | 🔴 |
| Architecture Risk | | | 🟢 | 🟢 |
| Enterprise Risk | | | 🟡 | 🟢 |
| Contractual Risk | | | 🔴 | 🟡 |
| Brand Risk | | | 🔴 | 🔴 |
| Execution Risk | | | 🟢 | 🟢 |

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# Funding

| Category | 2019 | 2020 | 2021 | 2022 | 2023 | Total | % of Total |
|---|---|---|---|---|---|---|---|
| Cost A | $# | $# | $# | $# | $# | $## | #% |
| Cost B | $# | $# | $# | $# | $# | $## | #% |
| Cost C | $# | $# | $# | $# | $# | $## | #% |
| Cost D | $# | $# | $# | $# | $# | $## | #% |
| Cost E | $# | $# | $# | $# | $# | $## | #% |
| Cost F | $# | $# | $# | $# | $# | $## | #% |
| **Total Cost** | $## | $## | $## | $## | $## | $#### | 100% |

- Key External Cost Elements:
  - A

  - B

  - C

  - D

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# Internal Resourcing

| Internal Hours | 2019 | 2020 | 2021 | 2022 | 2023 | Total | % of Total |
|---|---|---|---|---|---|---|---|
| Role 1 | # | # | # | # | # | ## | #% |
| Role 2 | # | # | # | # | # | ## | #% |
| Role 3 | # | # | # | # | # | ## | #% |
| Legal | # | # | # | # | # | ## | #% |
| Growth Board | # | # | # | # | # | ## | #% |
| Technology | # | # | # | # | # | ## | #% |
| **Total Hours** | # | # | # | # | # | **####** | **100%** |

- Key Resource Elements:
  - A

  - B

  - C

  - D

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# Success = Growth

These criteria will measure and determine success.

**Describe the Growth Projections and numbers**

*<Describe the benefit profile of your solution. Provide context as to how these results will be achieved. ?*

| | 5 Year Payback Period | | | | | |
| --- | --- | --- | --- | --- | --- | --- |
| | 2019 | 2020 | 2021 | 2022 | 2023 | 5 Year Total |
| **Revenue/Profit Impacts** | | | | | | |
| Increased Sales | | | | | | - |
| Increased Revenue | | | | | | - |
| **Total Benefits** | - | - | - | - | - | - |

**Describe what success looks like:  "Success is…"**

- Metric:  Describe success criteria
- Metric: More than xx% of associates….
- Metric: More than xx% of Agents….
- Metric:  ABC
- Metric:  XYZ

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# Recommended Next Steps

**Describe what you feel are the immediate next steps to get started**

- Step 1
- Step 2
- Step 3
- Step 4

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# The Ask

**Funding**

- <How much you need to chase this>

**Resourcing**

- 2019: <how many hours>

**Executive support**

- What you need from others to help move on this

**<Any Additional things you need to be able to effectively deploy your idea>**

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# Thank You

<Team Name>

- 👤 <Individual Name>
- 📱 <Phone Number>
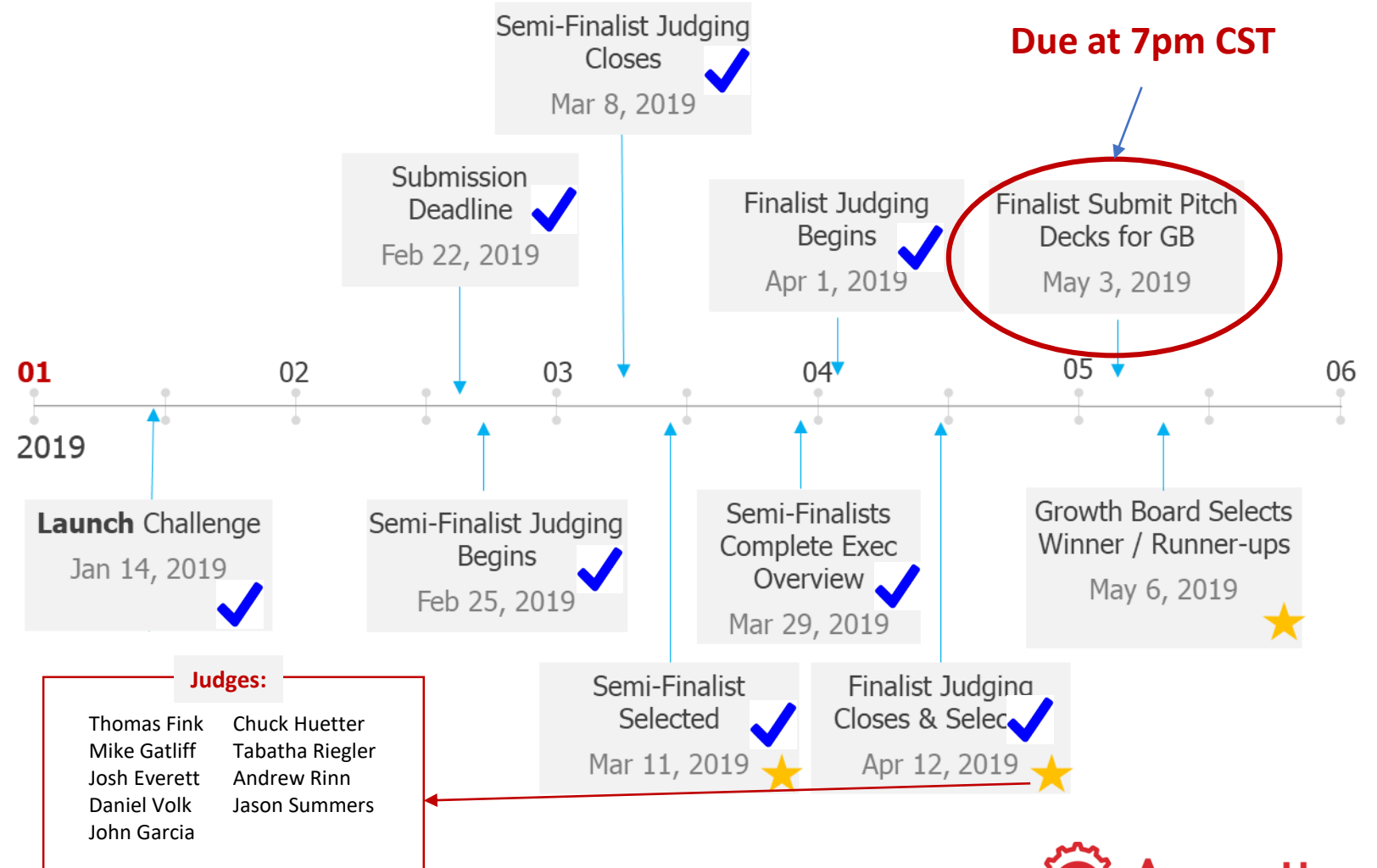- ✉️ <Email>
- 🌐 ameritas.com

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# What's Next?

**Timeline of activities:**

- March 12, 14, and 19: Executive overview coaching sessions

- March 11 – March 29: Executive overview completion

- March 29 @ 7:00 PM: Executive Overviews must be submitted

- April 1 – April 12: Finals judging to select the top 5

- **April 16 – May 3: Pitch deck completion**

- May 6: Final competition — winner and runners-up selected

**Due at 7pm CST**

Semi-Finalist Judging Closes
Mar 8, 2019 ✔

Submission Deadline ✔
Feb 22, 2019

Finalist Judging Begins ✔
Apr 1, 2019

Finalist Submit Pitch Decks for GB
May 3, 2019

**01**   02   03   04   05   06

2019

**Launch** Challenge
Jan 14, 2019 ✔

Semi-Finalist Judging Begins ✔
Feb 25, 2019

Semi-Finalists Complete Exec Overview ✔
Mar 29, 2019

Growth Board Selects Winner / Runner-ups
May 6, 2019 ⭐

Semi-Finalist Selected ✔
Mar 11, 2019 ⭐

Finalist Judging Closes & Selec ✔
Apr 12, 2019 ⭐

**Judges:**

| | |
|---|---|
| Thomas Fink | Chuck Huetter |
| Mike Gatliff | Tabatha Riegler |
| Josh Everett | Andrew Rinn |
| Daniel Volk | Jason Summers |
| John Garcia | |

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# Questions?

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