

# Engagement Brief

Showcase example | client and personal names redacted

 **Regional insurer** | Claims modernisation programme

## EXECUTIVE SUMMARY



A focused intervention is needed to reconnect service outcomes, critical decisions and delivery control without pausing the programme.

### SITUATION SNAPSHOT



Ageing claims platform being replaced.



Digital self-service and reporting changes underway.



Progress slowed by fragmented ownership and repeated decisions.

### SCOPE



**IN SCOPE**

- Decision bottlenecks
- Service ownership
- Dependency visibility
- Governance friction



**OUT OF SCOPE**

- Full strategy redesign
- Contract renegotiation
- Detailed technical solution design

### APPROACH: 3-WEEK Engagement

#### 1 FRAME

Align on context and goals



WEEK 1

#### 2 UNDERSTAND

Map decisions, owners and dependencies



WEEK 2

#### 3 MOVE

Define actions and create early momentum



WEEK 3

### KEY QUESTIONS

- ? Which decisions are blocking delivery?
- ? Who owns end-to-end claims outcomes?
- ? Where governance adds friction?
- ? Which dependencies threaten the next increment?

### EXPECTED CUSTOMER OUTPUTS



Issue statement



Decision map



Dependency view



90-day plan



Engagement readiness: **HIGH**

Strong leadership intent and active work underway create clear conditions to accelerate impact.

YWNBM

# Engagement Brief

## Claims Modernisation Decision Recovery

**PURPOSE** A concise statement of the pressure point, engagement boundary and decision outcomes agreed with the sponsor.

Engagement	Detail
Client	[REDACTED] UK general insurer
Context	Claims-service modernisation programme
Service	Rapid Fact Find
Document status	Illustrative customer-facing output
Date	September 2026

*Names, organisations and commercially sensitive details have been anonymised. The content is fictionalised for demonstration purposes.*

## The pressure point

The claims modernisation programme is funded, active and approaching two important delivery increments. Progress is being slowed by decisions that cross operations, technology, data, risk and supplier management. Senior leaders receive sufficient reporting, but do not have a shared view of which decisions are genuinely blocking progress, who owns them, or where to intervene.

**DECISION TO ENABLE** Confirm a single, decision-led route to resolve the small number of cross-functional issues that threaten the next two claims-service increments.

### Why this matters now

- Operational teams are being asked to validate designs late, increasing the risk of avoidable rework and service-readiness gaps.
- Programme governance is revisiting the same topics in several forums, without consistently recording the decision, owner or escalation route.
- Supplier commitments are becoming harder to hold because internal ownership and requirements remain ambiguous.
- The next release horizon contains dependencies that are not visible in one place.

### Engagement outcome

Within ten working days, the client will have a fact-based view of the material decisions, governance friction and dependencies affecting the next two delivery increments, together with a practical route for executive action.

### Engagement boundaries

In scope	Out of scope	Non-negotiables
Decisions affecting claims-service design, platform, data, risk controls and supplier accountabilities.	Rewriting the overall transformation strategy or redesigning individual delivery teams.	The programme continues during the fact find. Outputs must use existing evidence wherever possible.
Governance forums and escalation routes related to the next two increments.	A full supplier contract review or technical assurance of the platform.	No new standing governance forum is created without a clear purpose and decision remit.
Operational-readiness concerns that could affect customer outcomes.	A complete target operating model for all corporate functions.	Named owners are required for all actions and decisions.

## Working approach

Stage	What YWNBM will do	Customer contribution	Working asset
Frame	Confirm pressure point, decision outcomes, boundaries and evidence plan.	Sponsor session and rapid access to existing material.	Engagement Brief
Understand	Review evidence and hold focused conversations with leaders and delivery leads.	Make available current plans, governance material and nominated stakeholders.	Evidence and Insight Log
Move	Test findings, identify priority decisions and agree immediate next steps.	Attend focused playback and confirm accountable owners.	Decision Map and Mobilisation Plan

## Stakeholders to involve

Role	Contribution required	Why this matters
Executive transformation sponsor	Confirm intended outcomes and decision route.	Sets the intervention boundary and can mobilise leadership action.
Operations sponsor	Test operational readiness and service-impact concerns.	Ensures delivery is grounded in claims handling and customer outcomes.
Technology and architecture lead	Surface technical and integration dependencies.	Clarifies decisions that must be made early to avoid rework.
Programme delivery lead	Provide live plans, decisions, risks and dependencies.	Connects findings to delivery increments and existing cadence.
Data, risk and supplier leads	Clarify accountabilities, controls and commercial dependencies.	Prevents local optimisation across critical enabling functions.

## Initial evidence request

- Current delivery plans, release objectives and cross-workstream risks for the next two increments.
- Programme and governance papers covering open decisions, dependencies and escalations.
- Relevant claims-service process or readiness material, including operational impact assessments.
- Supplier plans, responsibility matrices and key change-control or dependency items.

## Success measures

Measure	What good looks like at close
Shared view	Executive sponsors agree the five or fewer issues that need intervention.
Decision clarity	Each priority decision has one accountable owner, evidence needs and a decision date or trigger.
Delivery focus	Material dependencies affecting the next two increments are visible and sequenced.
Operational confidence	Claims-service readiness concerns are represented in the immediate action plan.