FUNCTIONAL LEADERSHIP JOURNEY

# Create the capacity to change - then decide where it goes.

FUNCTION is a two-part, 12-hour working journey for a functional leadership team: one 8-hour session to imagine the function ahead, then one 4-hour session to choose experiments, owners and a 13-week roadmap.

## Faster work can still leave the function unchanged.

AI may remove effort, but time is absorbed and teams remain task-led. FUNCTION shifts the conversation to customers, outcomes and the future value of the function - then turns that direction into owned action.

IDEAL FIT · FUNCTION LEADER + UP TO 10 + DECISION AUTHORITY + EVIDENCE OF FRICTION

### SHARED FUTURE
Purpose + value

### COMMON LANGUAGE
Function + people + tech

### 10/10/10/10 CAPACITY
10% retain · 10% insource · 10% de-risk · 10% grow

**FUNCTION** — Imagine → Align → Allocate → Experiment → Commit

| 12h | 2 | 3–6 | 13 |
|---|---|---|---|
| two working sessions | 8h + 4h | bounded experiments | week roadmap |

### WITHOUT FUNCTION

Time savings disappear into more work. Outcomes stay vague. Ideas compete. The function has no shared view of what must change or who owns it.

### WITH FUNCTION

A future-function thesis aligns leaders. The 10/10/10/10 model allocates created capacity. Owners, experiments, OKRs and review cadence turn intent into the next 13 weeks.

### WHAT CHANGES BY THE END · £18,345 EX VAT

**The team leaves with a function vision, customer and stakeholder framing, team charter, three to six experiment cards, draft OKRs, an explicit 10/10/10/10 capacity allocation and an owned 13-week roadmap.**

*TEAM builds a shared working pattern. · ADVANCED deepens applied M365 capability. · FUNCTION redesigns functional capacity and change. · ACCELERATE proves one workflow.*

HOW IT WORKS · 8 HOURS + 4 HOURS, WITH SYNTHESIS BETWEEN

# Two working sessions turn a future view into an owned 13-week plan.

*Session 1 creates shared direction and options. Session 2 makes the choices, ownership and operating rhythm explicit.*

| F | I | S | C | O |
|---|---|---|---|---|
| FRAME | IMAGINE | SYNTHESISE | COMMIT | OPERATE |
| before · evidence | 8h · future | between · challenge | 4h · choose | 13 weeks · learn |

## THE TWO-SESSION JOURNEY

01 **SPONSOR FRAME · BEFORE** — Confirm functional outcomes, decision rights, customer perspectives, constraints and evidence of friction.

02 **SESSION 1 · 8 HOURS** — Imagine the future function. Define customers, mission and outcomes; surface what changes, blockers, capacity and opportunity themes.

03 **SYNTHESIS · BETWEEN** — Turn the day's work into a draft vision, team charter, opportunity map, OKRs and experiment candidates for challenge.

04 **SESSION 2 · 4 HOURS** — Select three to six experiments. Agree measures, owners, first sprint, dependencies, review cadence and the 13-week roadmap.

### AI MAY HELP

Research · transcribe · synthesise · challenge assumptions · draft · compare options

### LEADERS ALLOCATE

10% retention · 10% insourcing · 10% new risks · 10% cross-functional growth

### 10/10/10/10 GATE

**Proceed when leaders have allocated the created capacity, named the first investments and agreed how evidence will release the next pound.**

**OPERATING RULE** Time saved is not value until leaders reallocate it. Use 10/10/10/10 to make the first capacity choices explicit, then test each choice against outcomes and cash.

## WHAT THE FUNCTION LEAVES WITH

### Function Vision
Purpose, customers, future value and what must change.

### Team Charter
How leaders will work, learn and decide together.

### Opportunity Map
Friction, capacity, risks and intervention themes.

### 3–6 Experiments
Assumption, measure, owner, boundary and stop rule.

### 10/10/10/10 Model
Allocate created capacity across retention, insourcing, new risks and cross-functional growth.

### 13-Week Roadmap
Sequence, first sprint, dependencies and cadence.

**Complete when leaders have allocated the created capacity, named three to six experiments, set value measures and booked the 13-week review rhythm.**

UNUM DELIVERY EVIDENCE · PEOPLE / HR

# A future vision becomes an owned operating system for the next 13 weeks.

FUNCTION connects three real outputs: where the function is going, how the leadership team will work, and what it will do first.

**1**
future-function vision

**1**
leadership team charter

**13**
week working roadmap

**Delivered UNUM People / HR session outputs from November 2025. These are working artefacts for leadership ownership and refinement, not realised benefit claims.**

## Vision statement – 2025-2028 *[Simplified]*

**UNUM HR aims to lead the insurance industry by creating a strong and flexible workforce** that blends human skills with smart automation to provide great value, trust, and compliance for everyone involved.

**We will shift from basic HR tasks to strategic roles** that support a growth mindset, manage risks, and promote inclusion, helping all teams adapt, learn new skills, and build a culture focused on ethics, wellbeing, and responsibility.

**In a world driven by AI and constant change, UNUM will stay committed to honesty, customer care, and opportunity,** helping employees succeed and customers feel safe.



## Team Charter for HR Leadership Team [from session]

**Our Mission:** To transform HR into a future-ready, digitally-enabled function that empowers our people and drives business impact.

**Our Commitments:**

- Embrace an experimental, agile mindset - we will test and learn quickly, iterating based on results
- Ruthlessly prioritize and focus our efforts on the highest-impact initiatives
- Proactively reallocate time from BAU to transformation, challenging the status quo
- Leverage AI and digital tools to boost our productivity and effectiveness
- Foster a culture of continuous improvement, learning and growth
- Collaborate closely with IT and other functions to drive cross-functional change
- Transparently track and communicate our progress against ambitious goals

**Our Aspirations:**

- Reduce time spent on meetings and administrative tasks by 30% to free up capacity
- Achieve 80% employee self-service for core HR processes through digital enablement
- Upskill the HR team in data analytics, digital fluency and change management

### Q1: Build Capability

GenAI upskilling for all HR roles — mandatory learning sprints ensure every team member can leverage AI tools effectively

Launch GenAI sprint teams — cross-functional pilots test automation in high-impact areas

### Q3: Scale Analytics

GenAI analytics platform — real-time dashboards and predictive insights transform decision-making across People Function

1 2 3 4

### Q2: Deploy Solutions

### Q4: Achieve Excellence

*UNUM People / HR · delivered vision, leadership team charter and draft roadmap · November 2025*

## WHAT THE WORK MADE VISIBLE

**VISION The value the function intends to create. CHARTER How leaders will work, learn and decide. ROADMAP The first priorities, experiments and review points across 13 weeks.**

## THE OPERATING PACK

### An owned rhythm.

Direction → leadership behaviours → priorities → owners → evidence → review rhythm. The artefacts work as one system, not separate session outputs.

**NEXT STEP · Confirm owners, evidence and the review rhythm for the first 13 weeks.**