



Partnering with Beneva to bring its bold plan to life as a digital organization, powered by business agility

Beneva Insurance is pursuing a bold and ambitious plan to make its mark as an industry digital leader in today's dynamic, hypercompetitive environment. To do this, Beneva has identified Business Agility as a key strategic lever to efficiently and flexibly connect strategy to execution. They have trusted CGI to help them orchestrate change through a three-year, disciplined agile transformation program.

The insurance industry's consolidation trend continues with global mergers and acquisitions, building on last year's momentum and [rising by 23 percent during the first half of 2022](#). Digital transformations, new forms of risk, and an evolving demand for modern customer services and products are redefining the insurance industry and prompting companies to meet today's reality with new business and operating models. Speed, flexibility, and agility have become critical for insurers to bring products to market faster than their competitors.

Context – Business agility as a key strategic lever

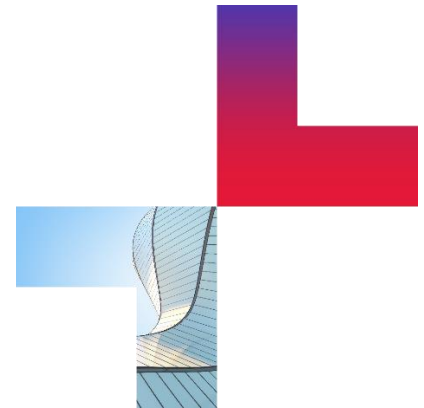
Created by the coming together of La Capitale and SSQ Insurance, Beneva is the largest insurance mutual in Canada with more than 3.5 million members and customers.

Beneva's goal is clear: to deliver the best in modern digital customer experiences while earning top marks as an outstanding employer with a dynamic innovation culture. To fulfill their business ambitions, Beneva's executive board knows that business agility is a must.

But evolving to enhance business agility can be very disruptive and comes with risks if not carried out carefully. To mitigate these risks, Beneva pursued an agile transformation strategy in line with their organizational context, conducting changes with an iterative and incremental approach, and maximizing learning as they go. It's a complex task, especially when implementing an agile delivery and governance model across all business lines at once. The challenge is even bigger when transformation occurs while executing a massive merger program, creating a new culture and maintaining operational excellence in today's pandemic environment.

Beneva chose CGI, a long-time partner of both SSQ and La Capitale, as its strategic partner to ensure a disciplined, well-structured journey toward business agility. Seamlessly and flexibly connecting strategy to execution, while capitalizing on the full potential of their employees, will ultimately position Beneva to deliver the best in insurance products and services in today's fast-changing industry.

CGI's proven experience in the insurance industry, mergers, and integrations contexts, Agile-Lean organizational transformation, and the SAFe framework proved to be an ideal fit for Beneva's highly ambitious plan.



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“Becoming more agile is our only way to succeed. We need to continuously prioritize our investments and make sure we allocate our precious capacity to the proper initiatives. We also need to cadence and synchronize our teams—each of them being part of a big puzzle.”

Catherine Desgagnés-Belzil
Executive Vice-President and Leader, Business Performance and Information Technology - Beneva

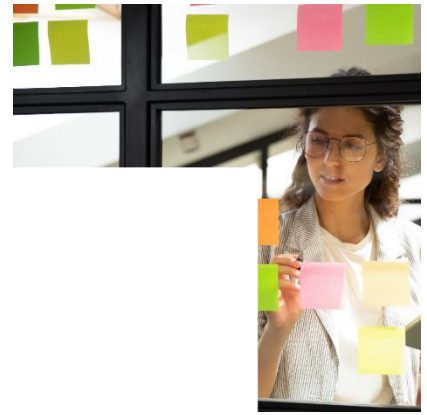
How we helped - Orchestrating change through a disciplined, agile transformation program

With the Beneva leadership team, our strategic advisors co-created an agile transformation program called *Symphony* to orchestrate Beneva's agile journey, bringing together key leaders from across the organization (Agile Center of Excellence, Strategic Planning, Project Management Office, Enterprise and Solution Architecture group, the organizational development team leader, and HR). All key functions of the organization are part of *Symphony*.

This program was designed as a three-phase approach over three years, beginning with a stabilization phase and followed by an acceleration and optimization phase. It includes implementing agile portfolio management as a key strategic pivot between the corporate strategic planning and the delivery teams, as well as the organization of these delivery teams around stable and high-performing delivery-value streams. The program also aims to enhance efficiency through continuous improvement, supported by performance metrics and agile leadership at all levels, using Beneva's target culture as a lever.

During the first three months, we helped Beneva develop the vision, roadmap, and governance structures needed for successful transformation. It was imperative to have senior management actively involved in order to ensure full engagement across all business lines and key corporate functions. We also collaborated closely with the client's organizational excellence centres to make sure Beneva's way of working was aligned with the same key agile principles and a shared vision.

With Beneva's vision, roadmap, and executive sponsorship in place, the next step was to stabilize the governance and delivery system with proper training, mentoring, and coaching, making sure we learned from our initial experiments, and creating a safe learning space for everyone. A strong change management and communication strategy was paramount to completing this phase and to keeping everyone engaged and aligned.



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Value added - Embedding agile leadership in the corporate culture

Today, more than 85 agile teams, grouped into 15 trains, orchestrate their work to continuously deliver value based on initiatives prioritized by the company's 6 portfolios.

In addition to focusing on core business lines and IT engineering practices, we worked with Beneva to ensure that agile leadership was embedded in the new organization's workplace culture. Making an agile mindset integral to employee and management onboarding and training is critical.

Anticipating the cultural impact of business agility and engaging key executives and HR throughout the change management process helped Beneva's leaders foster a positive, collaborative environment that is fundamental to success.

With CGI's guidance, Beneva is positioned to become a modern, agile organization and is ready to accelerate its value delivery and optimize its governance and delivery model.

About Beneva

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Created by the coming together of La Capitale and SSQ Insurance, Beneva is the largest insurance mutual in Canada with more than 3.5 million members and customers. Beneva employs over 5,000 dedicated employees: people looking out for people. Its human approach is rooted in mutualist values that are shared by its employees. With \$26.8 billion in assets, Beneva positions itself as a major player in the insurance and financial services industry. Its head office is located in Quebec City. For more information, please consult beneva.ca.



“Working together and sharing our expertise in a context of mutual trust, empathy, openness and respect is at the heart of our partnership with CGI.

With their support, we are making rapid progress towards our goal to maximize our business agility, a key strategic lever in our strategic planning.”

Catherine Desgagnés-Belzil

Executive Vice-President and Leader,
Business Performance and
Information Technology - Beneva

About CGI

Insights you can act on

Founded in 1976, CGI is among the largest IT and business consulting services firms in the world. We are insights-driven and outcomes based to help accelerate returns on your investments. Across hundreds of locations worldwide, we provide comprehensive, scalable and sustainable IT and business consulting services that are informed globally and delivered locally.

For more information about our Business Consulting services in Canada, visit cgi.com.