

# AFP 2021

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## Creating an Agile Finance Team at Swiss Re

Craig Stevens  
SVP & Head of Reporting  
Swiss Re US Life & Health


Gaileon Thompson  
SVP & Head of Finance  
Wells Fargo CSBB Operations



# Finance Offsite – Nov 2017

## Team Spirit!



A dramatic sky with a bright sun breaking through dark, heavy clouds. The sun is positioned in the upper left quadrant, creating a strong lens flare and illuminating the surrounding clouds. The overall tone is dark and moody, with the sun providing a stark contrast to the deep blues and greys of the sky.

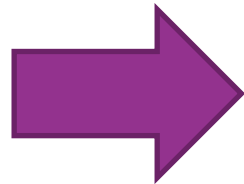
**May 2018**  
**Extreme Team Disruption**

# Rewind...Strategy 2016

- **What are goals for change?**
- **Decided where want to be 3 & 5 years**
- **Map it out**
- **Determine risks and mitigants**
- **Involve key decision makers and influencers**
- **Further map out strategy**



# Design New...Don't Redesign



# Be Brave!



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# Group Therapy

- **Transparent communications**
- **Open discussion sessions**
- **Build team & individual resilience**
- **Focus on the future**



# Build an All-Star Team



- **Determine what you want to achieve**
- **Behaviors & characteristics needed**
- **General roles / responsibilities**
- **Find the best people possible**



# Cultivate a High Performing Team

## The Expert

- Tactical problem solvers
- Focuses on incremental improvements inside unit boundaries
- Performs activities as individuals rather than as a team
- Led by a “Supervisor” type rather than strategic manager

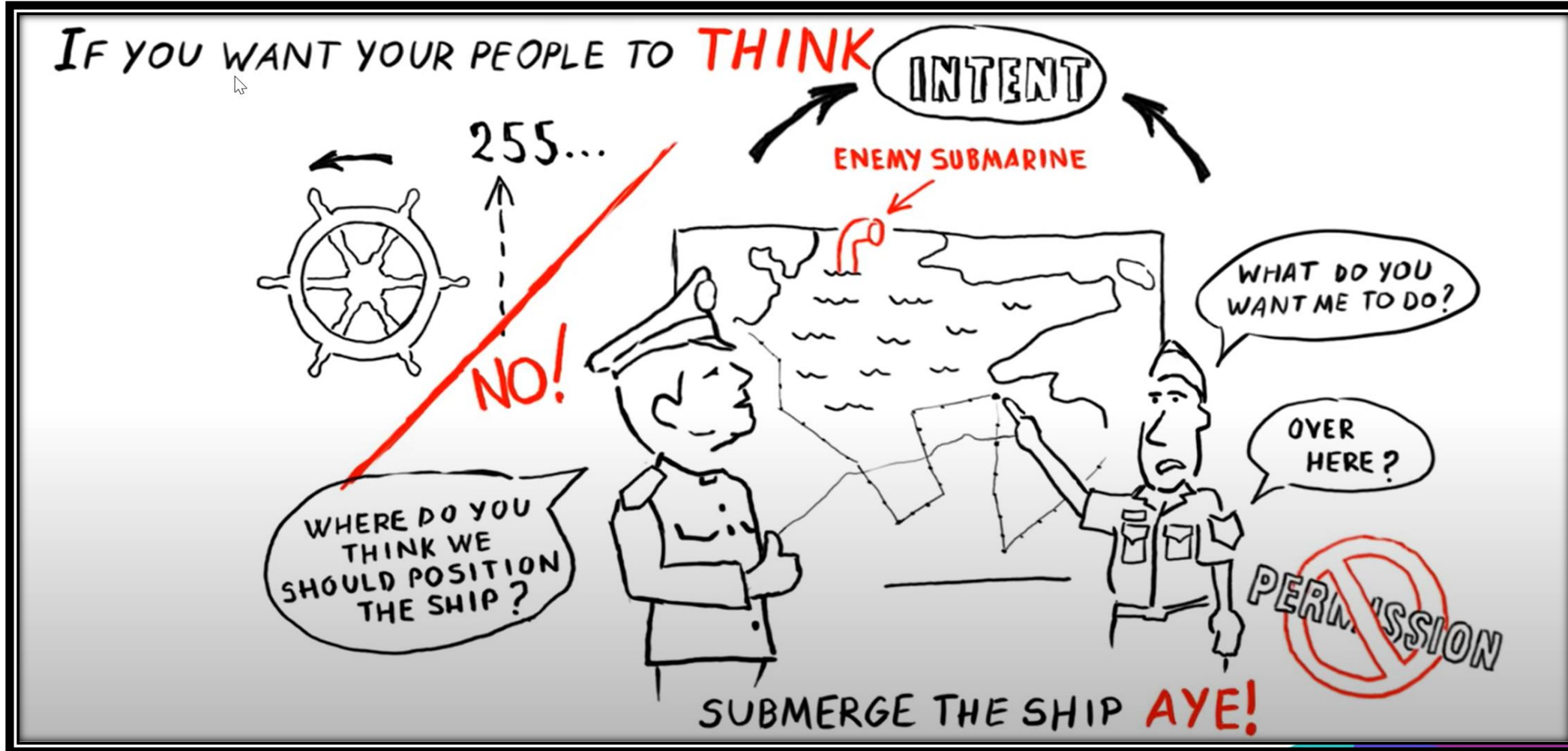
## The Achiever

- Strategic approach focused on outcomes
- Managed with a “Team” view
- Motivated individuals that result in stronger performance
- Manager communicates ideas and then solicits feedback

## The Catalyst

- Visionary, inspirational, and facilitative team and leadership
- Culture that promotes teamwork, participation, and empowerment
- Proactive engagement with diverse stakeholders
- Leader of team is a facilitator to create a high participation by members

# Catalyst Leader- Lead with Intent



YouTube: "Greatness" by David Marquet

# Optimize Organizational Structure



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# Create an Innovative Team Structure

Me...the Ultimate Ruler!

Team Name	Team Members
<b>Finance Operations</b>	Head of Finance Ops Senior Leader 1 Senior Leader of US L&H Reporting
<b>Financial Reporting</b>	Lead Controller Senior Leader 1 Senior Leader 2
<b>Complex Accounting</b>	Head of Complex Accounting Senior Leader 1
<b>Actuarial Expert</b>	Lead Actuarial Expert Senior Leader 1

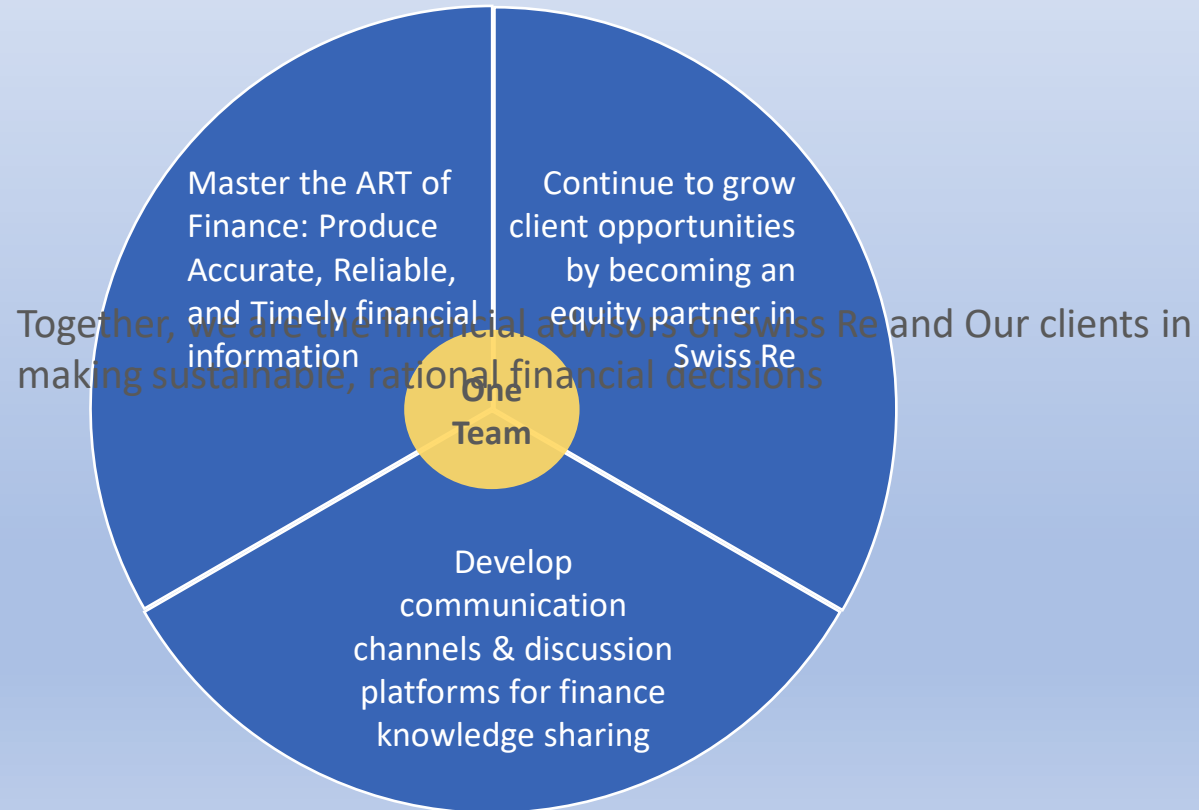
Me-Team Coach  
 Bangalore Manager  
 US Bangalore Team

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# Build a Meaningful Purpose and Strategy

**Our Strategy**

**Our Purpose**



# Frequent Pulse Checks

- **Create a safe environment**
- **Ask open ended questions**
- **Adjust goals**
- **Provide and receive feedback**



# Create Fun & Energy!



- **Celebrate wins**
- **Learn but move past losses quickly**
- **Loosen up...be silly**
- **Build a forever bond**

# Hot Debrief

- Be creative – think outside the box
- Build an All-Star team
- Create a Purpose & Strategy that will stand the test of time
- Become a catalyst team – empower individuals
- Lead with Intent
- Check in frequently on progress
- Have fun!



# Be a Team!



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