



PUBLIC SECTOR

GLACIER SUMMIT PRESENTATION

Insurance | Financial Planning | Retirement | Investments | Wealth



Sanlam

**PUBLIC
SECTOR
PORTFOLIO**

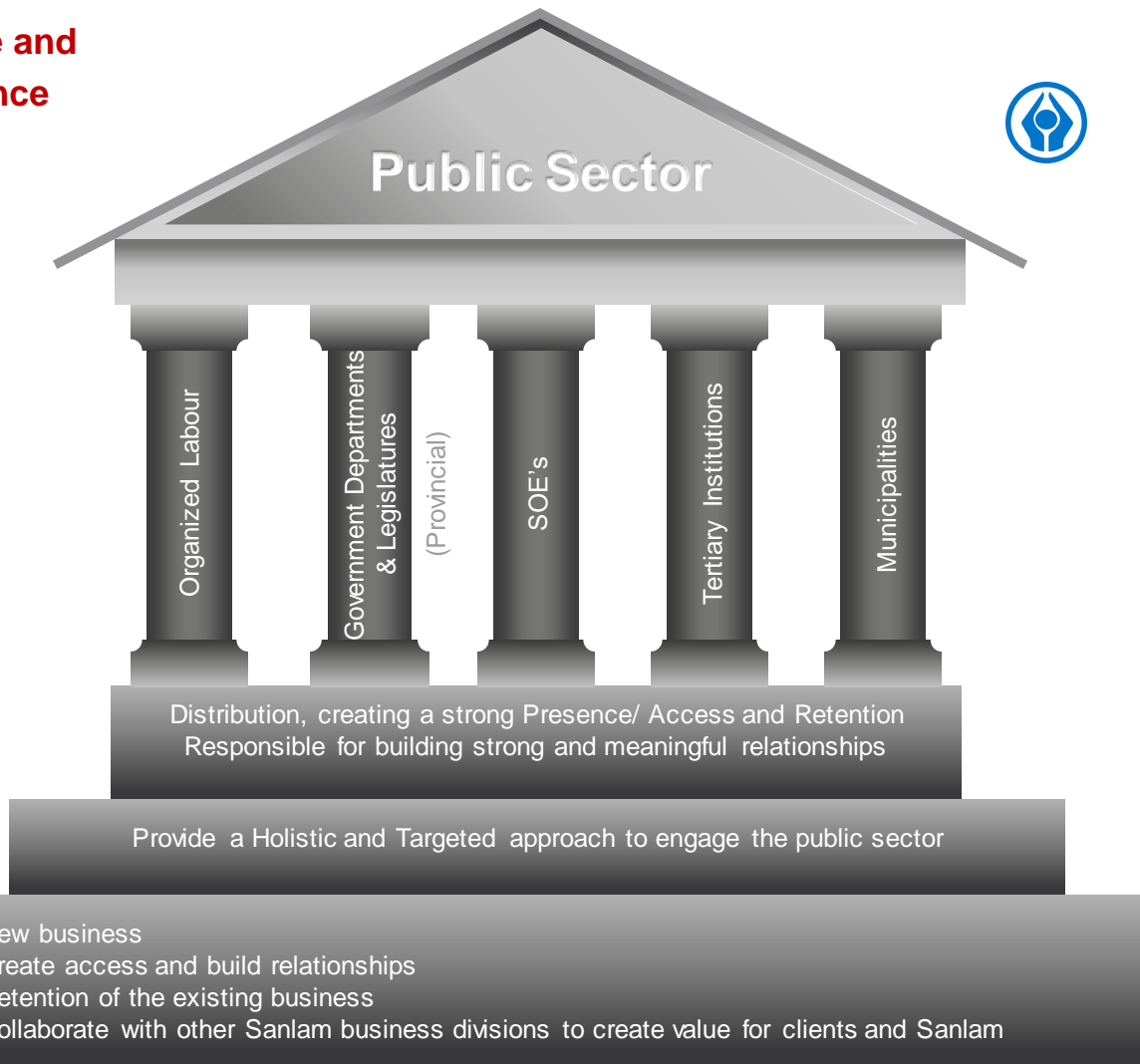
Insurance | Financial Planning | Retirement | Investments | Wealth

We Aim to Build a Formidable, Profitable and Client Value Driven Public Sector Presence

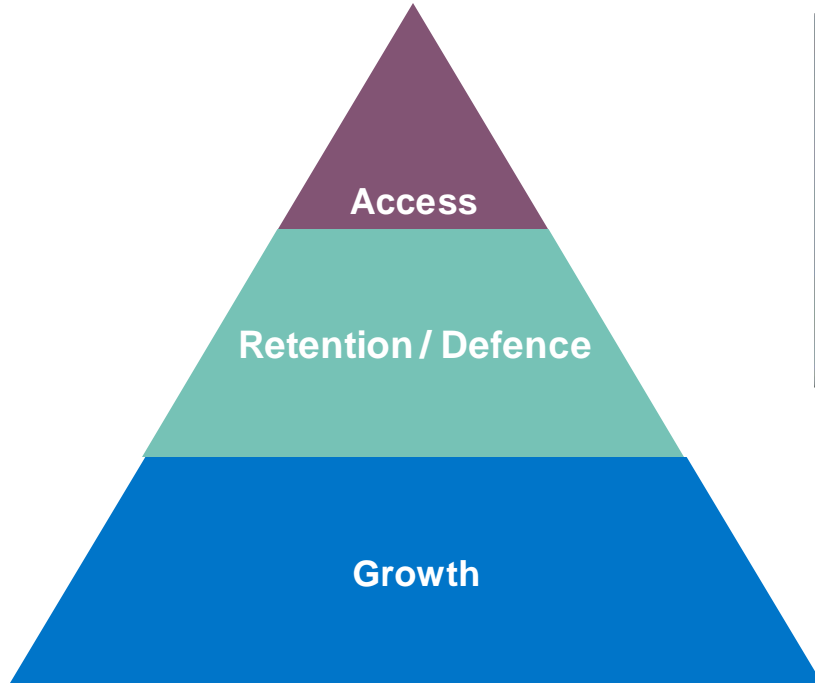


STRATEGIC OBJECTIVES

- ③ Developing a Foresight about viable futures and potential options and choices
- ③ Choosing and building a strategic architecture for competitive advantage
- ③ Implementing public Sector Strategic plans taking into account emerging realities- dynamism
- ③ Creation of a unique and valuable positioning anchored on a differentiated set of activities
- ③ Understanding trade offs in competing and choosing our Unique Competing Space
- ③ Quantifying how we will achieve sustainable, superior, long-term returns on investment



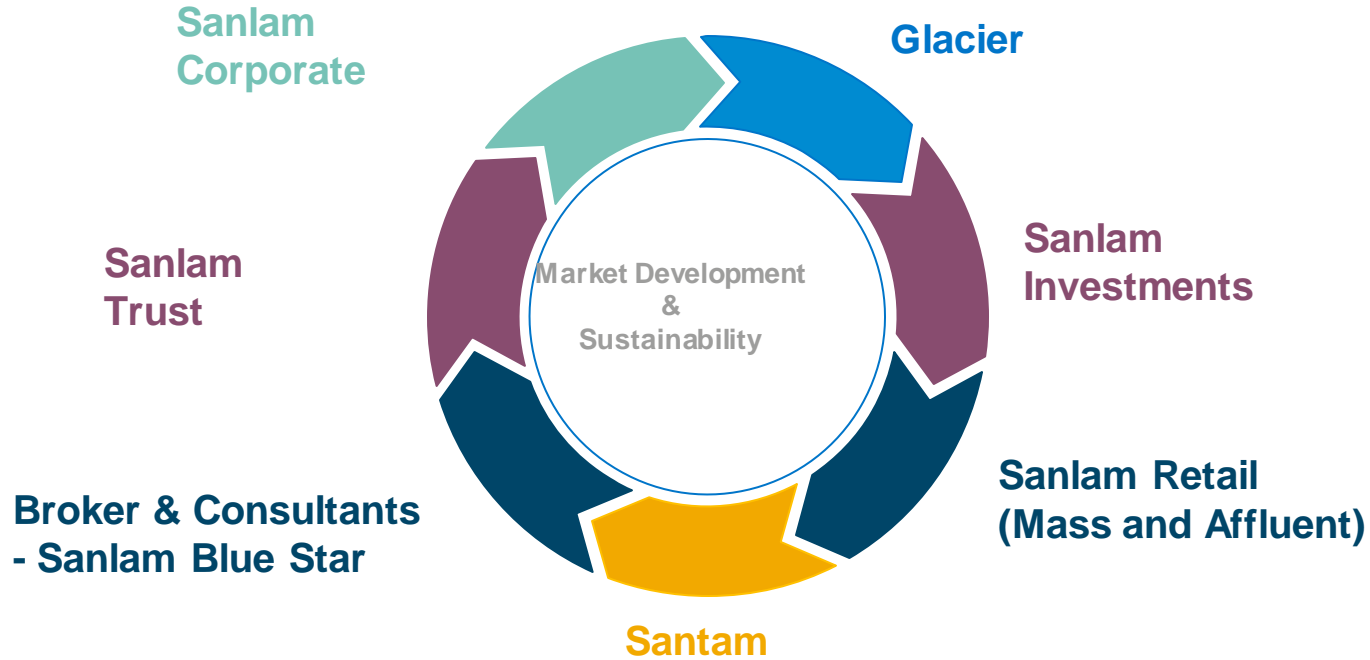
STRATEGIC INTENT



PUBLIC SECTOR STRATEGIC MAP



SANLAM GROUP – ORGANISED LABOUR CONTACT BASE





POTENTIAL MEASUREMENTS FOR RETURN ON INVESTMENT

FOR DISCUSSION



Return on Investment



Sales and Leads

- Access to members (% of member base)
- **Leads generated** through trade unions / it's members
- **Sales generated** through trade unions / it's members
- Growth in book value



Brand / reputation management

- Trade union sentiment analysis or NPS
- Negative coverage avoided



Retention & Risk Mitigation

- Any other dimensions / measures for return on investment?
 - Ability to influence regulations / policy e.g. drive split risk, promote Primary health insurance



WAYS OF WORKING WITH TRADE UNIONS

🕒 Key questions:

1. What are the **overall rules of engagement** with the trade unions?
2. **How often should we engage** with the trade unions? Is this dependent on the size of the union? What other factors should be considered with regards to engagement (e.g., geography, level of influence, existing relationships)?
3. **How should the level of engagement differ based on prioritisation** of trade union? E.g., How do we engage with the top 20 versus how we engage with trade unions who are on our 'monitor' list?
4. **Who should engage** with the trade unions? Is it only the allocated jockey? How does this change in instances where a trade union has multiple touchpoints within Sanlam?
5. How can we ensure that we have a common approach and communicate consistently to the trade unions? What is the **collective value proposition that we take to unions** that showcases the full extent of Sanlam?
6. **How can we effectively share costs** (e.g., sponsorships, business development) in instances where there is mutual benefit for various parts of Sanlam?
7. What **other partnership models** should we consider with Trade Unions in order to effectively drive ROI from our investments with the unions?

questions[®]

thank you 