

The Decision Maker

May 2005

The second edition of the Decision Maker brings you the most up-to-date news and insight about the new Decision Intelligence tool, presented by GFS-IM. The development effort for Decision Intelligence is underway and the first rollout of the tool is scheduled for late June.

Decision Intelligence, simply put, is Business Intelligence with a focus on strategic decision-making. With the help of our business partners, GFS-IM will harness the power of AEFA-wide data to deliver an enterprise-wide strategic reporting solution for decision makers to track, manage and evaluate their business-critical metrics.

This web-based application is provided by Actuate, a proven leader in the Financial Services Reporting and business intelligence industry. Our goal is to achieve 100% adoption by targeted users of this tool across the AEFA organization.

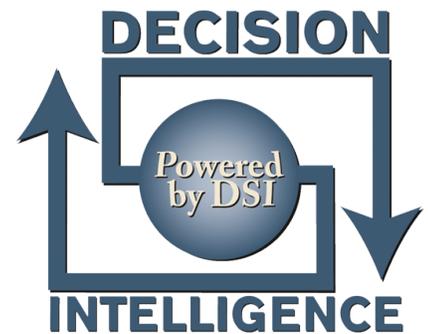
The progress we made in 2004 set the foundation for things to come and feedback from the over thirty test users has helped us define many key requirements and pave the way for 2005 and beyond.

Decision Intelligence Accomplishments

GFS-IM focused on laying the groundwork for Decision Intelligence in 2005. Some of the major achievements included:

- ◆ Used IRB seed money to build a "proof of concept" prototype
- ◆ Developed a comprehensive roadmap including: justification, benefits, solution, processes, governance, release concept, execution timelines, measures of success
- ◆ Presented the prototype demo and roadmap to more than 40 groups at all levels and businesses areas across AEFA
- ◆ Following a successful IRB gate in July, GFS-IM received funding through the end of 2004 to build a working prototype
- ◆ Established a governance structure
- ◆ Delivered a foundational working prototype in October to a test user group

Following the successful launch of the Decision Intelligence prototype, GFS-IM collected feedback and "lessons learned" from the internal project team. This feedback is being leveraged to build the full production Release of the Decision Intelligence tool, scheduled for March 2005.



DI Governance Committee Members

- GFS-IM - Mark Satran
- Finance - Mark Riordan
- BBMP - Justin Morgan
- Field Reporting - Scott Schufman
- Field Implementation - Janet Cataldo
- Marketing - Andy Schell
- Insurance - David Matteson
- Annuities - Kimberly Mickelson
- Mutual Funds - Kris Henderson
- Technologies - Mike Hennessy
- Controllers - Dave Stewart
- Compliance - Chris Kopka
- Wholesaling - Mike Kirchner
- Financial Education & Planning - Rusty Field
- Cross Sell/Risk/Information Management - Jeff Williams (*)
- Insurance, Annuities, Finance - Art Berman (*)

What's in Store for 2005?

The Decision Intelligence project team is now moving forward with the full production release, scheduled for March 2005. The cross-organizational Decision Intelligence Working Team submitted a list of key metrics-driven features to be developed as requirements to include in the first production release of the tool.

The core DI project team prioritized these requirements, based on a specific set of objective decision principles. The requirements proposed for March 2005 were approved by DI Governance Committee.

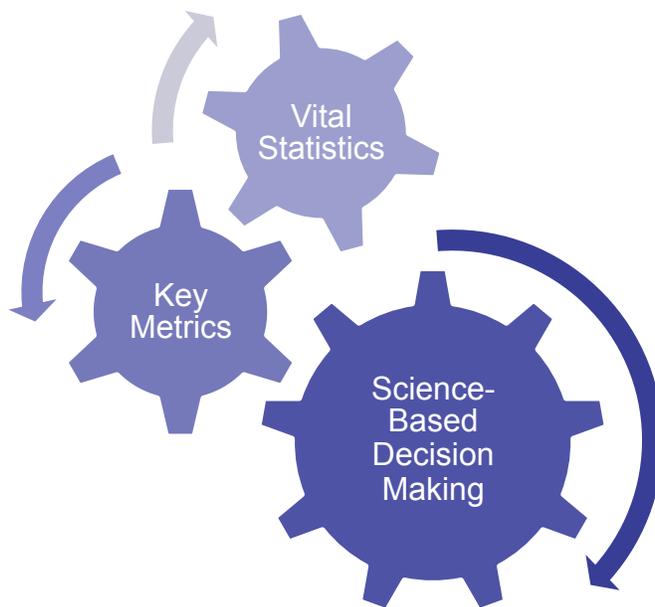
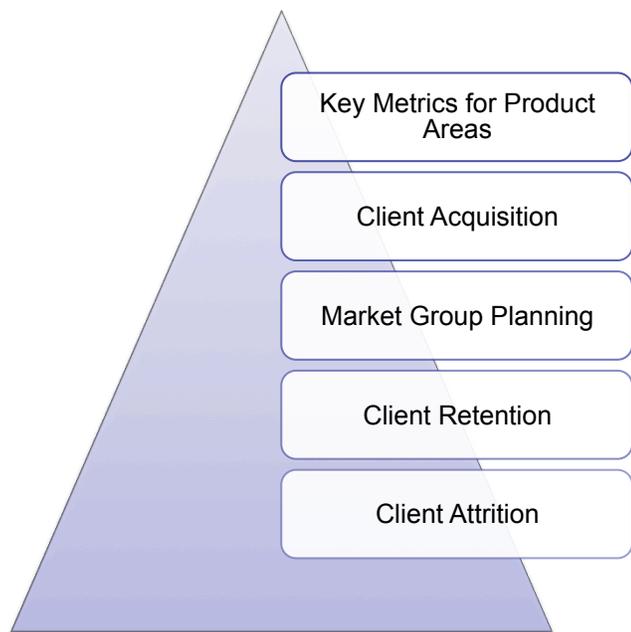
Some of the key areas of focus for the June 2005 Release include:

- ◆ Key Metrics for Product Areas
- ◆ Client Acquisition and Market Group Planning
- ◆ Client Retention

The specific features to be included in the March 2005 Release are listed in the yellow box to the right. Requirements for features that were deemed out of scope for June will be re-evaluated for a future Release in 2005 or 2006.

Features of the June 2005 Release:

- ◆ Key Metrics Phase I - Brokerage
- ◆ Vitals Stats - Insurance
- ◆ Sales Metrics (Vitals) - Annuities
- ◆ Client Attrition and Retention
- ◆ Client Acquisition and Market Group Planning



An Eye on the Future of NewCo

In today's business environment, the need for timely and accurate fact-based decision making is greater than ever. The Decision Intelligence Governance team will play a key role in prioritizing the requests for each of the Decision Intelligence Releases planned for 2005.

If you would like to know more about Decision Intelligence, please check out our website at:

<http://gfsim.extra.aexp.com/gfsim.html>

You may also contact any member of the project, working or Governance teams.