

**BIAS**

**ORACLE** Platinum  
Partner

Cloud Excellence Implementer  
North America

# Cloud ERP/Financials/EPM/HCM

Citizens Inc. SaaS Cloud Transformation

# Agenda

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**Introductions**

2

**BIAS Corporation: Our Cloud Focus**

3

**Citizens, Inc. Background**

4

**Citizens, Inc. Journey to the Cloud**

5

**Actions to Ensure Success & Next Steps**

6

**Q&A**

# Meet the Speakers

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**Ken Pavell**

Manager  
EPM



**Ryan Tilles**

Director  
ERP/HCM

# Company Overview



Founded in 2000 with locations in Atlanta, GA, Reston VA, Bangalore & Hyderabad, India



5-Time Oracle Excellence Award Winner



~400 employees with 10+ years of Oracle experience on average



Oracle Platinum Partner  
Cloud Excellence Implementer



BIAS Global Delivery Center  
Appraised at CMMI Level 3



Service Organization Control (SOC) 2 Certified



35 Oracle Specializations spanning the entire stack



Inc. 500 | 5000 Fastest Growing Private Companies in the U.S. for the 8th Time



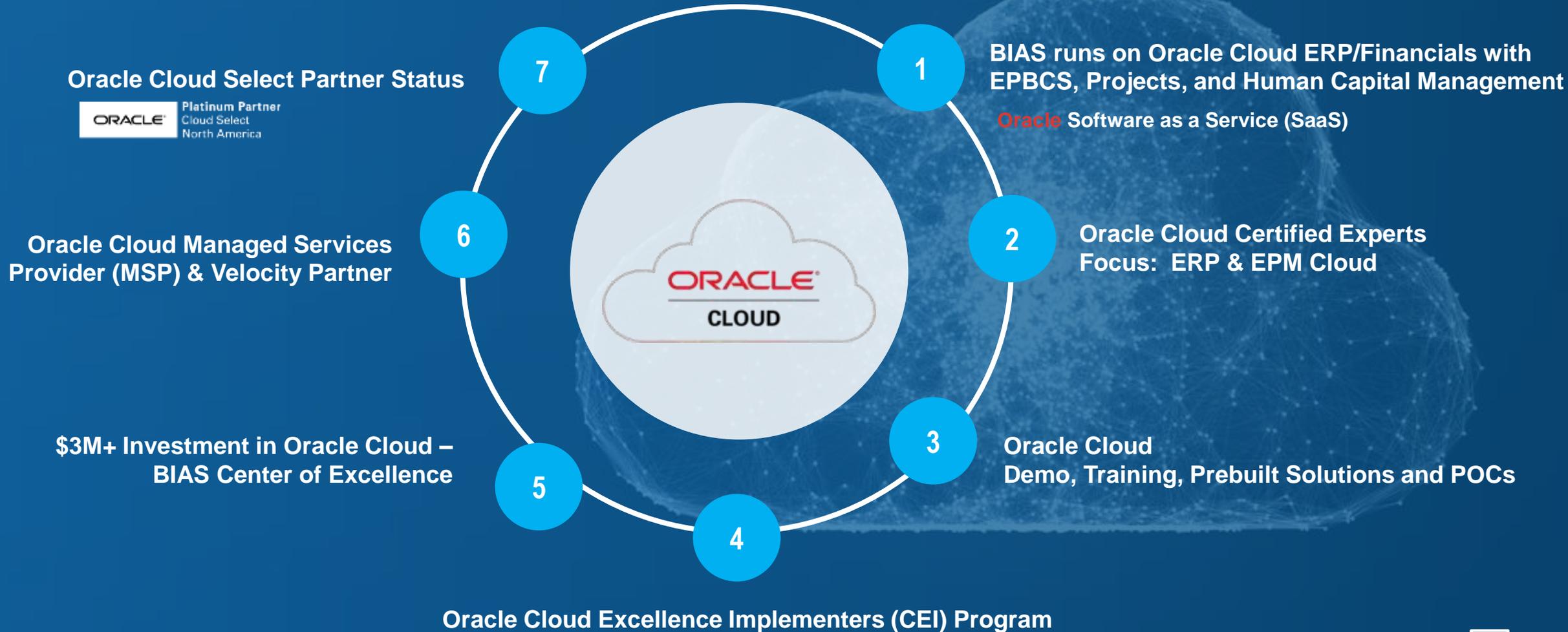
2018 Best Places to Work



ISO 27001 Certified - Information Security Management System

# BIAS Investment in the Cloud

**BIAS**



# BIAS APPLICATION PRACTICE

## *BIAS Capabilities*

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**BIAS**



1

Prepackaged FP Solution Offerings

2

Roadmaps, Implementations, Upgrades, Managed Services

3

ERP, SCM & EPM SaaS Cloud, On-Premise: EBS, JDE & Hyperion

4

Hybrid Cloud Strategies with SaaS & On-Premise

5

Focused Industries: Financial Services, Retail, Hospitality, Food & Beverage, Manufacturing & Public Sector

6

90% Cloud Certified



# Our Values

#BIASLife



One Team



Unwavering  
Integrity



Be the Spark



Adopt a Growth  
Mindset



Forever  
Innovate



Exceed the  
Mission



Connect with  
Community

# Our Mission

We leverage technology to solve business challenges and deliver innovative solutions with expertise, hard work and passion.

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# Citizens, Inc. Background

# Citizens, Inc. Business Overview

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- Insurance holding company based in Austin, TX
- Offers living-benefit life insurance products designed to provide peace of mind and financial security to individuals and families around the world
- Founded in 1969, Manage over \$1.6B in assets
- Publicly traded through acquisition in 1987





# Citizens, Inc. Business Situation & Pain

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**Dated mainframe system  
behind in technology**

**Numerous manual processes  
no automation**

**Limited reporting and analytics  
capabilities**

**Depend on Excel for calculations &  
financial reporting**

**Improve internal controls &  
reconciliation processing**

**Long processing times due to  
required manual intervention**

**Lack of visibility to business  
data**

**No Budgeting platform**

**BIAS**



# Citizens, Inc. Cloud Journey

# Citizens, Inc Path to Cloud

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- 1 Evaluation Process
- 2 Why Oracle SaaS Cloud?
- 3 Why BIAS?
- 4 Business Transformation
- 5 Implementation Approach

# Cloud Solution Phased Approach



## PHASE 1: 18 weeks

- ERP Cloud Financials, Invoice Imaging, Expenses
- Enterprise Planning & Budgeting Cloud Service
- Account Reconciliation Cloud Service
- Go-Live on Sep 4, 2018



## PHASE 2: 18 weeks

- HCM Cloud: Core HR, Benefits, Time & Labor, Absence, Recruiting & Onboarding
- Go-Live on Oct 7, 2018

# Citizens, Inc. Cloud Results with ERP/EPM



## Integration with Policy Admin System

Integration with policy admin system, banks and financial institutions



## Business Intelligence Tools

Business intelligent tools to obtain information quickly



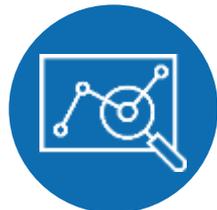
## Budget & Expense Automation

Budget & Expense automation with version and approval controls, Integrated Allocation with JE upload



## Proactive Decision Making

Automated account reconciliations with full auditing



## Proactive Analytical Reporting

Proactive analytical reporting, Cash, GAAP and STAT



## Budgeting & Planning

Enable automated approvals and auditing capabilities

# Citizens, Inc. Cloud Results with HCM



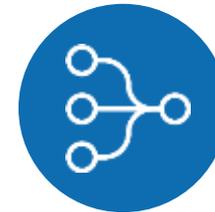
## Integration with Citizen's Benefit Providers & ADP Payroll System

Integration with Citizen's benefit providers and ADP payroll system to improve automation and internal controls



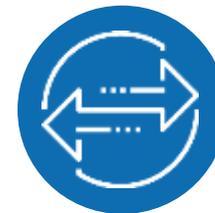
## Self-service Capabilities

Provide personnel management, manager and employee self-service capabilities



## Seamless Integration between HCM & ERP Cloud

Seamless integration between HCM & ERP Cloud allows for single point of maintenance



## Streamline HR Data-entry

Streamline HR data-entry and simplify information retrieval

# Value to Citizens, Inc.

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1

Modern User experience with collaboration

2

One integrated, secure system

3

Streamline the close process

4

Improve Internal Controls

5

Provide a platform for Accounting to make change

6

Aligns with Citizens Digital Strategy

7

Decrease Business reliability on IT

# Actions to Ensure Success

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1

Ensure Change Management is built into plan

2

Get users into the system early and often

3

Project Management and team is critical to the success

4

Company Leadership support

5

Establish meeting cadence with Stakeholders and ensure communication is clear and concise, key decisions are brought to the attention early and resolved in a timely manner

6

Implementation partner relationship is key

7

Start with the basics, and stay standard

8

Be flexible and stay positive as unforeseen business initiatives always pop up (Bermuda)

# Next Steps for Citizens, Inc.

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1

- ✓ **Managed Services/  
Optimizations from  
BIAS**

2

- ✓ **Develop internal  
experts to support  
Oracle Platform**

3

- ✓ **Phase 2 of HCM  
Cloud rollout**

*“Oracle’s integrated applications helped Citizens align with our digital strategy, improved internal controls, allowing finance to be in control and help streamline the financial close. BIAS provided first-rate project management and guidance throughout the implementation and more importantly, provided resources that fit with the Citizens team.”*

*- Jeff Conklin, Chief Accounting Officer*



# Questions?

Thank you for attending!

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