National Life Group®

Proposal Title:		**Date of Request:**
Initiator:	**Business Area:**	**Project Priority:**
		Desired Solution Date:

General Project Proposal Description:

1. Business need, problem, opportunity, issue, and/or pain point this project proposal addresses?

2. Describe how the project proposal benefits the organization. (Note the business need, problem, opportunity, issue, and/or pain point.)

Section I - Regulatory/Compliance

1. Is this proposal a result of a new or updated regulation? If 'No', skip to Section II. (If applicable, please attach a regulatory summary)

2. Is this in response to a new or updated regulation?

   How soon does the regulation take effect? ☐ < 1 year   ☐ 1 year to 2 years   ☐ > 2 years

Section II - Corporate Strategic Alignment (write out Corporate Strategy)

1. In what ways does this proposed project align with the corporate strategy, if at all? (Corporate compliance could result in N/A)

Section III - Cost Benefit
(If 'Yes' to any, please explain)

1. Is it anticipated that this project proposal will result in a reduction in operating expenses?

2. Is it anticipated that this project proposal will result in an increase in revenue?

3. Is it anticipated that the project proposal will result in a change in staffing?

4. Is it anticipated that the project proposal costs can be capitalized? (If questions about what can be capitalized, reach out to Financial Reporting.)

Section IV - LEAN (Process Improvement and Efficiencies)
(If 'Yes' to any, please explain)

1. Is it anticipated that the project proposal will reduce the amount of processing time, overtime and/or allow for the redeployment of staff resources?

2. Is it anticipated that the project proposal will reduce the amount of rework, resulting from errors, flaws, or defects?

3. Is it anticipated that the project proposal will automate a manual process?

Section V - Resource Requirement
(If 'Yes' to any, please explain)

1. Does FMG have a subject matter expert on staff?

2. Is it anticipated that the business resources will have the capacity to work on the project proposal?

3. Is it anticipated that the project proposal will require IT involvement?

4. Is it anticipated that the project proposal will require external vendor resources?

Section VI - Risk and Control
(If 'Yes' to any, please explain)

1. Is it anticipated that the project proposal will satisfy a current outstanding audit finding?

2. Is it anticipated that the project proposal will improve the business control environment?

3. Is it anticipated that the project proposal will address an unsupported system?

4. Is it anticipated that the project proposal will consolidate duplicate systems?

Section VII - Improves Cash Management
(If 'Yes' to any, please explain)

1. Is it anticipated that the project proposal will improve cash management?

Section VIII - Complexity and Size

1. Is it anticipated that the project proposal will take less than 6 months to complete?

2. How many hours will this proposal require?

3. Is it anticipated that the project proposal work is contained within one business area?

4. Is it anticipated that the project proposal work is contained within one campus?

Section IX - Improves Customer Service

1. Is it anticipated that the project proposal will improve customer service?

Project Coordinator Use