

Exploring Emerging Technology & Gen AI Trends in CPI

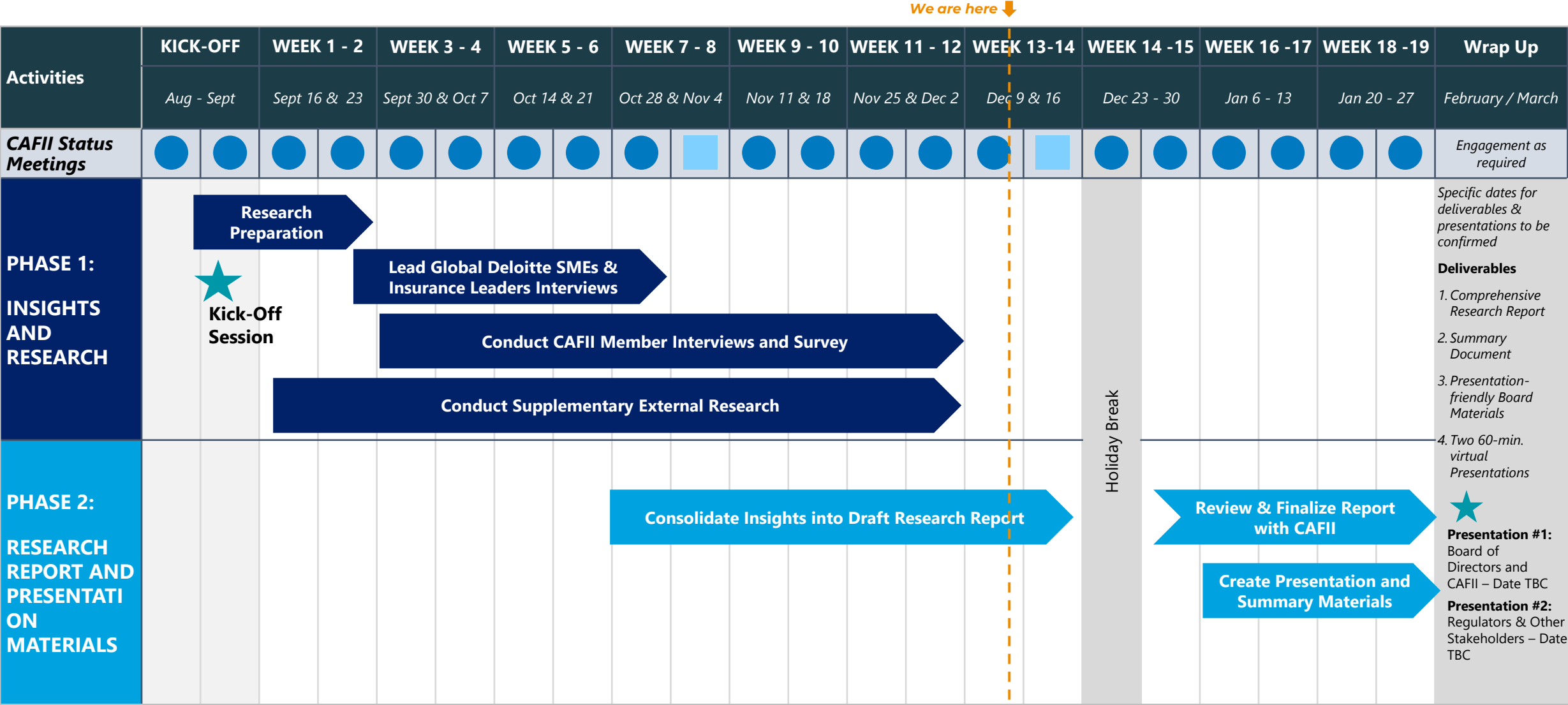
Bi-Weekly Status

December 12th 2024

cafii
The Canadian Association of
Financial Institutions in Insurance

Deloitte.

Where we stand today



Status Report – Week of December 9th

OVERALL STATUS:

ON TRACK

KEY ACTIVITIES COMPLETED

- ✓ Consolidated responses from survey begun drafting key takeaways from survey / interview insights
- ✓ Received 10 out of 15 responses
- ✓ Begun drafting final report (PowerPoint Format)

KEY ACTIVITIES IN-FLIGHT

1. Development of survey key takeaways / insights synthesis
2. Finalize report first draft (PowerPoint Format)

UPCOMING ACTIVITIES

1. Schedule RMEC session for mid-jan to review final report (PowerPoint Format)
2. Share report first draft (PowerPoint Format)
3. Complete final report

MILESTONES (M) / DELIVERABLES (D)

	Timing	Status
1 Kick-Off (M)	Prep	C
2 Stakeholder Interviews (M)	Week 1-5	C
3 Conduct Quantitative Survey (M)	Week 3-5	OT
4 Conduct Supplementary External Research (M)	Week 3-5	OT
5 Touchpoint #1: Share preliminary findings (M)	Week 8	C
6 Preliminary Research Report (M)	Week 10	M
7 Touchpoint #2: Review & Refine with CAFII RMEC	Week 13	
8 Comprehensive Research Report (D)	February	
9 Summary Document (D)	February	-
10 Presentation-friendly Board Materials (D)	February	-
11 Virtual Presentations (D)	TBC	-

OUTSTANDING ITEMS / ISSUES / RISKS

Description	Owner	Current Status	Due Date	Status
n/a	n/a	n/a	n/a	OT

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