



Lottery Oversight Committee Update

18 Feb 2016

Today's Objectives

Objectives for today's meeting:

- i. Update you on our progress
- ii. Talk you through the next steps through to the next LOC meeting in March 2016
- iii. Show the structure behind the Situation Analysis
- iv. Demonstrate how it fits within the Business Planning process

Progress and Next Steps

- The Situation Analysis has now been completed
- All Camelot Subject Matter experts have been in Arkansas meeting with key personnel
- Video conferencing has been utilized between the USA and the UK
- A series of internal workshops are taking place this week and next to achieve the following:
 - Review the completed Situation Analysis to extract the key insights, implications and initiatives
 - Consider the key strategic thrusts and sub-strategies to be included in the Business Plan and timings
 - Produce a first draft Business Plan for the OAL by Feb 26th 2016
- Week commencing Feb 29th 2016: Members of the Camelot Global team will be in Arkansas for group workshops
- Week commencing March 7th: A 5 Year Business Plan will be formally submitted to the OAL on March 8th 2016
- We will give an Executive Summary of the Business Plan with the LOC at the next meeting

Situation Analysis Structure

1. Executive Summary
2. Macro Overview
3. Lottery Overview and Performance
4. Instant Games
5. Online Games
6. Retail
7. Marketing
8. Supplementary Information

How the Situation Analysis fits into the Business Plan

- The Business Plan will be split into a number of sections including key areas such as: Environmental Analysis, Strategy, Financial Modelling and Enablers. The findings from the Situation Analysis are key

1) Environmental Analysis

- Current Trading; Situation Analysis Summary; PEST Summary (Political, Economic, Social and Technological), Competition; Current Financial Performance

2) Strategy

- Mission & Vision; Strategic Thrusts; Opportunities; Player Evolution

3) Financial Modelling

- Sales and net revenue forecasts attributed to each strategy and initiative. Including a “phasing in” approach versus proposed timings

4) Enablers

- What is required to implement the Business Plan – resources, process changes, ways of working

Next Steps

1. We will continue to work collaboratively with the Lottery team
2. March 8th 2016: 5 Year Business Plan Submitted to the Director of the OAL and the Director of the DFA
3. March 17th 2016: LOC Meeting