



# REPRESENTATIVE ENGAGEMENT

## Branch Optimization

<b>Client Profile:</b>	<ul style="list-style-type: none"> <li>■ A national commercial and retail bank</li> </ul>
<b>Business Issue:</b>	<ul style="list-style-type: none"> <li>■ Optimize branch performance and staffing levels</li> </ul>
<b>Engagement Plan:</b>	<ul style="list-style-type: none"> <li>■ Create time standards in support of staffing tool</li> <li>■ Identify and implement process improvements in branches and branch support areas</li> <li>■ Identify optimal position / activity alignment and resulting resource requirements to improve sales and customer service</li> </ul>
<b>Solution:</b>	<ul style="list-style-type: none"> <li>■ Defined and identified processing requirements for all activities conducted in a branch</li> <li>■ Collected and analyzed a statistically valid data sample</li> <li>■ Conducted branch / branch support interviews and observations</li> <li>■ Assessed organizational design and activity alignment</li> <li>■ Implemented new staffing model and flexible staffing plan</li> <li>■ Developed prioritized implementation plan for more than 200 sales, service and operational efficiency opportunities (e.g., centralization)</li> </ul>
<b>Benefits:</b>	<ul style="list-style-type: none"> <li>■ Staff level reductions resulting in over \$9 million in annual recurring benefit</li> </ul>

