

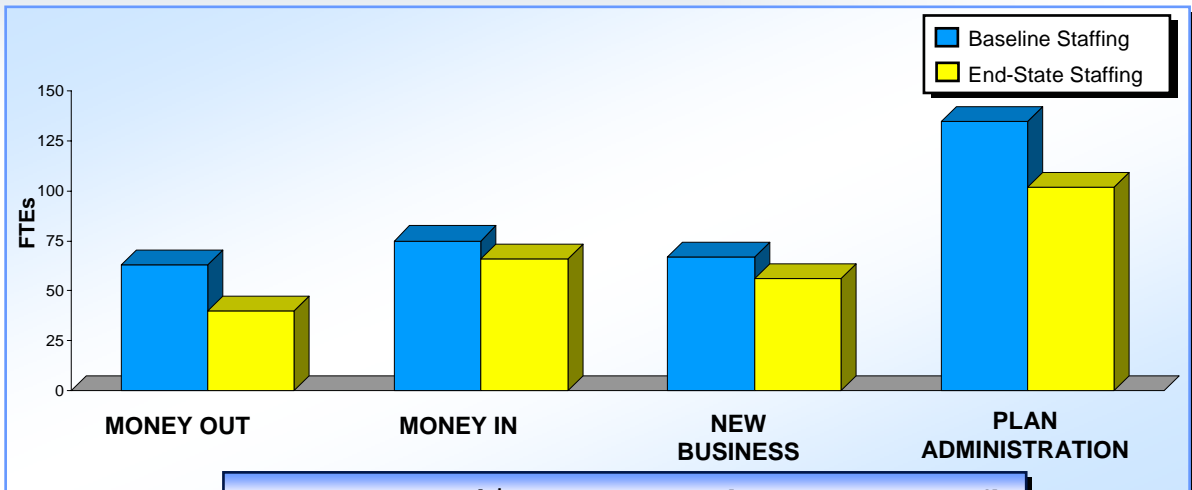


# REPRESENTATIVE ENGAGEMENT

## Reengineering and Staff Modeling

<b>Client Profile:</b>	<ul style="list-style-type: none"> <li>Large Retirement Services division of global diversified financial services company which services a broad client group, including Corporate, Education and Health &amp; Government clients</li> </ul>
<b>Business Issue:</b>	<ul style="list-style-type: none"> <li>Lower unit cost in servicing operations to achieve average or better performance relative to industry peers</li> <li>Improve overall customer experience</li> <li>Achieve improvements with little or no initial technology investment</li> </ul>
<b>Engagement Plan:</b>	<ul style="list-style-type: none"> <li>Conduct a detailed assessment of each function within the customer servicing operations, including Money In, Money Out, New Business, and Plan Administration</li> <li>Assess efficiency and effectiveness in terms of error rates, service delivery and transaction processing</li> </ul>
<b>Solution:</b>	<ul style="list-style-type: none"> <li>Developed detailed staffing models in each function to identify excess capacity and to assess value of process improvements and ways to improve service delivery</li> <li>Collaborated with client to implement agreed upon recommendations, including rightsizing each function</li> <li>Developed benefits tracking and reporting system for senior management to monitor implemented changes</li> </ul>
<b>Benefits:</b>	<ul style="list-style-type: none"> <li>Customer Service staff level reduction of 73, resulting in \$4.0 million recurring annual benefit</li> </ul>

### RESULTS



**73 Fewer FTEs / \$4.0 MM Recurring Annual Benefit**