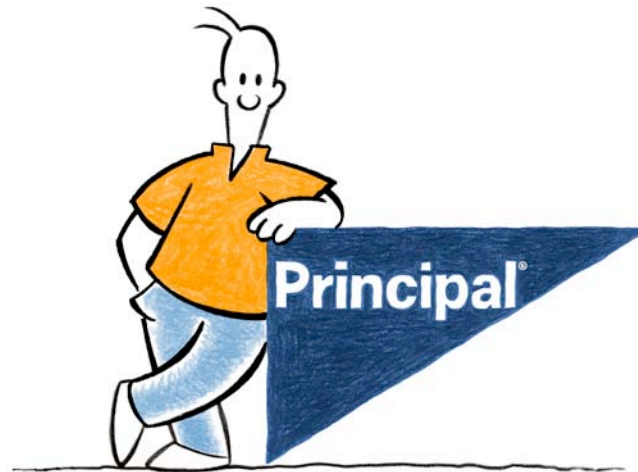


Results Forum Process Streamlining

Marketer Set-Up Streamlining Project

Cheryl Paine, Asst Director-Sales Support



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Problem

- **Opportunity:** Work time to execute the Marketer Services Contracting process is 42 min and cycle time is 31 days — these work and cycle times are too long, and these excessive times cause both excessive cost and business partner dissatisfaction, while reducing the process capacity.
- **Scope:**
 - Contracting and appointing for Independent marketers
 - Ensure that quality of work produced is not decreased from the present level

Approach

Lean Redesign Steps:

- 1. Define:** agree upon the process scope to be considered; assemble stakeholders; understand customers
- 2. Measure & Analyze:** identify sources of excess work time, cycle time & inventory using process & data analysis
- 3. Redesign:** identify concepts to improve efficiency, pilot changes, and implement effective solutions
- 4. Control:** document the process, and monitor & drive performance

Marketer Set-Up Streamlining Project

Timing & Methodology



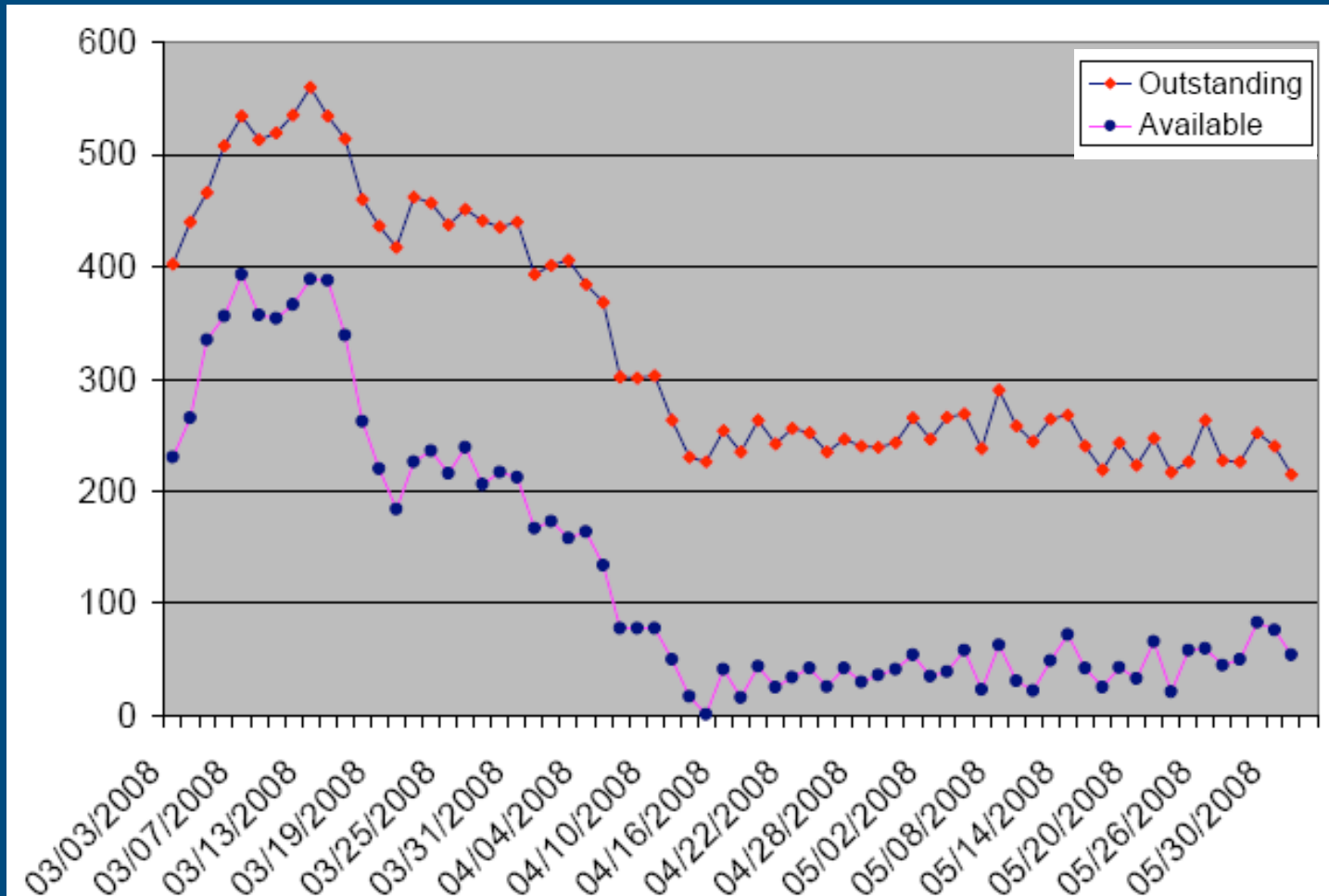
Solutions

- Eliminated non-value-add role resulting in one touch mail sort/scan model
- Combined work throughout two day process, including reduced handoffs by 3 touches
- Decreased follow-up on not-in-good-order (NIGO)
- Visual displays driving team performance

Result: Process time = 35 min

Marketer Set-Up Streamlining Project

Controls

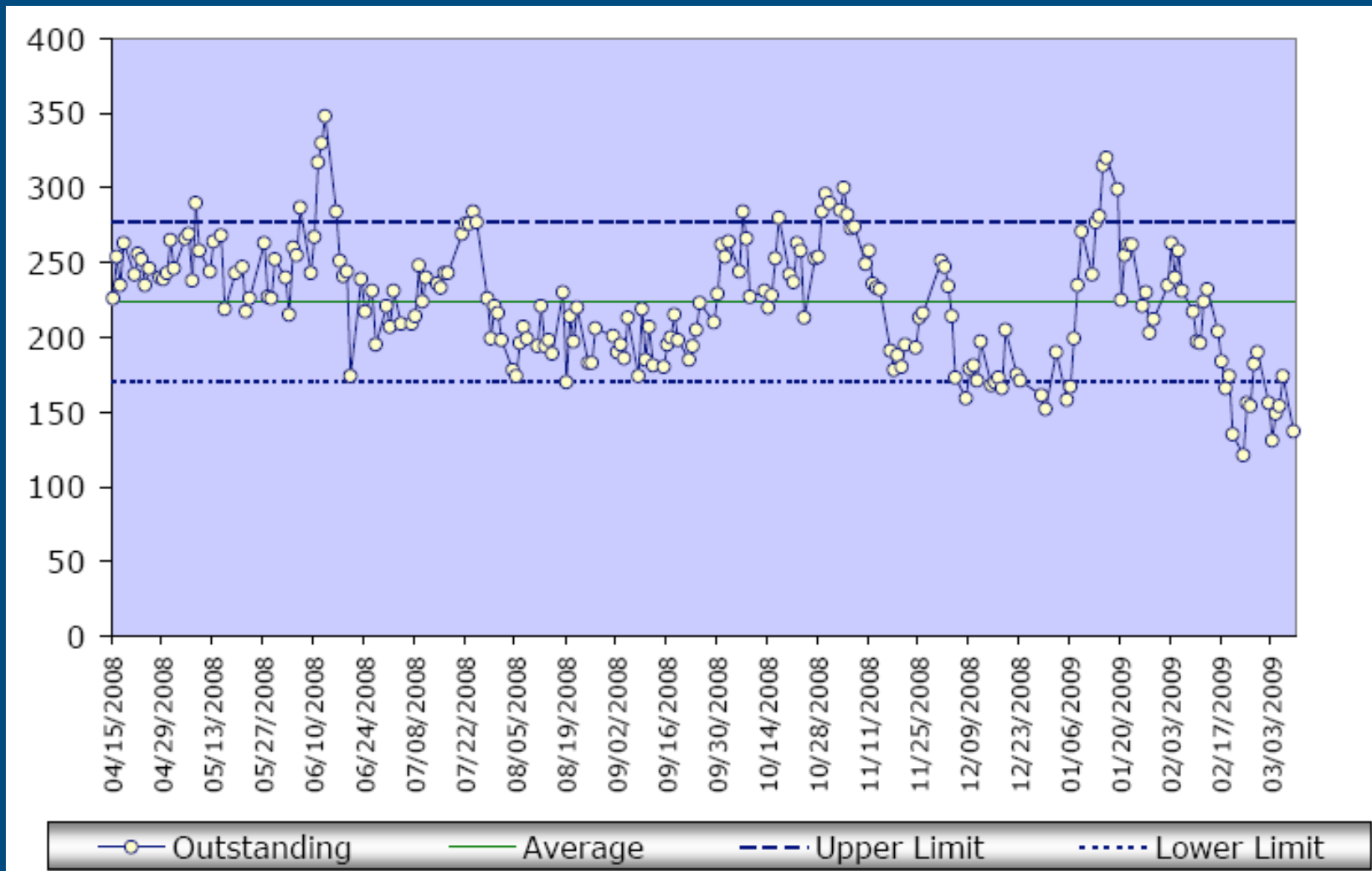


Principal®

Financial
Group

Marketer Set-Up Streamlining Project

Controls



Marketer Set-Up Streamlining Project

Results

- Reduce inventory to 0-2 days
- Reduced labor costs
- Redeployed labor

Questions?

