



ENGAGED TEAM PERFORMANCE IN GROUP PROPOSAL SERVICES

- **Client:** The Principal Financial Group®
- **Business Area:** Group Proposal Services
- **Opportunity:** Streamline the work to produce a quote for Specialty Benefits and Health products; align team structure and goals with new processes; and reorganize the department for optimal performance
- **Results:**
 - Removed three handoffs from the process, going from four people touching a quote to single-touch processing
 - Process changes improved labor efficiency by 17%
 - Performance management, data feedback, and collaborative norms to allow associates to control their own workflow resulted in additional gain of 21% labor efficiency
 - Reduced staffing by 27 FTEs (\$1.2 million annually)