



## FUNCTIONAL REVIEW

- **Client:** A large financial services company
- **Business Area:** Group, Life, and Health segments
- **Opportunity:** Deploy process assessment and reporting tools to multiple levels of leadership, allowing each department team to deliver a 90-minute presentation to senior management to report its process effectiveness (customer metrics), efficiency snapshot, drivers of work volume, critical challenges, and key process improvement opportunities for the coming year
- **Results:**
  - Facilitated 28 single-day prep sessions with different departmental teams to study their processes and metrics
  - Ensuing presentations to senior leadership obtained commitments for \$2.5 million in 2007 for immediate staffing reductions and/or avoidance of hiring (50 FTE)
  - All three divisions exceeded 2007 annual expense goals