Process Streamlining in Agent Contracting

- **Client:** A large financial services company
- **Business Area:** New Marketer Setup (Contracting)
- **Opportunity:** Marketer Setup is the first experience a new marketer has with the company — the process operated with a 15-day setup cycle time, frustrating new marketers and the distribution team by delaying new case submission
- **Findings:**
  - Substantial numbers of setup requests came in incomplete
  - Team was attempting multiple follow-ups on incomplete requests rather than processing in-good-order requests quickly
- **Results:**
  - Streamlined process to remove 3 handoffs and reprioritize work
  - Reduced cycle time to within 2 days for every complete submission
  - Reduced setup and follow-up labor by $500,000 annually
  - Setup speed became a competitive advantage!

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