



CENTRALIZING A COMPLEX TASK

- **Client:** A retirement services company
- **Opportunity:** Streamline the work to conduct annual compliance tests and align team structure and goals to sustain optimal performance
- **Key Findings:** Organization structure drove differences in process by business segment and required dispersed complex skills
 - 120+ employees in one business segment each did only 2.2 days of work per person-year on compliance testing
 - Centralized testing teams in other segments had significant opportunities to improve team performance efficiency
 - Business segments had different rules for applying tests
- **Results:** Reorganized the compliance testing function within dedicated teams with Engaged Team Performance controls, resulting in:
 - 4.5 FTE capacity improvement v. historical-based forecast
 - Cleared compliance testing queues in record time v. prior years
 - "The new queue design was extremely beneficial. Testers can focus on the 'right work' instead of spending time reassinging work."