



IMPROVING THE FIRST MARKETER EXPERIENCE

- **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!