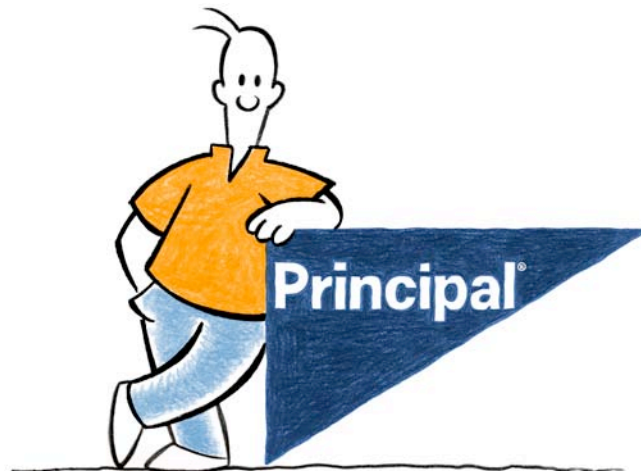


Team Performance Controls Results Forum

Group Proposal Services

Julie Stanley



WE'LL GIVE YOU AN EDGE®

Team Performance Controls

- The GPS team produces quotes for group medical and non medical benefits to enable the field distribution team's selling process
- Designed new performance controls in June, 2006, after completing a process streamlining project, organization change, and facility move
- Performance Control package included:
 - Workplace organization for visual control
 - Collaborative norms to promote teamwork
 - Team dashboards with relevant metrics

Workplace Organization

- Team work areas open to the center of the team
 - Line of sight to “daily work bins” to make work-in-process (inventory) visual and obvious
 - Bins replaced in 2008 with electronic images vs. paper
 - Encourages communication
 - Allows all team members to see dashboard measures
- Work area is kept clean, quiet, and organized



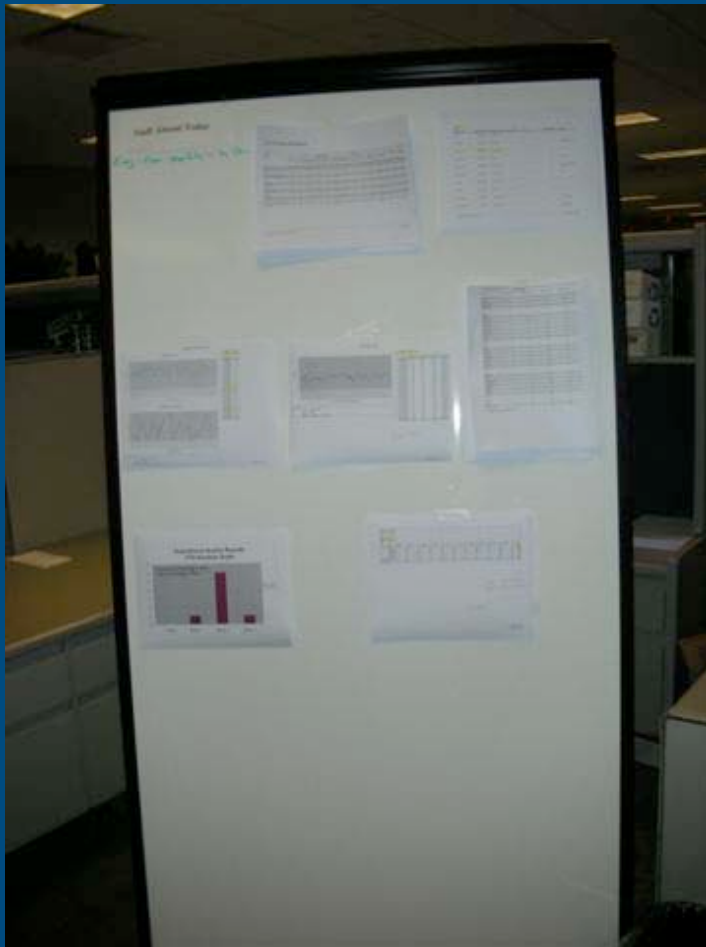
Collaborative Norms

- Team members used to have an individual “goal” of 15 quotes/day
 - It was: “A group of individuals, not a team”
- Accomplished cross-training to remove knowledge barriers to sharing work
- Primary goal was changed to a TEAM goal to “get all of the team’s quotes to customers on time”
- Team and individual performance now measured based on “time credit” for work completed, based on complexity of each quote (demonstrated later here)

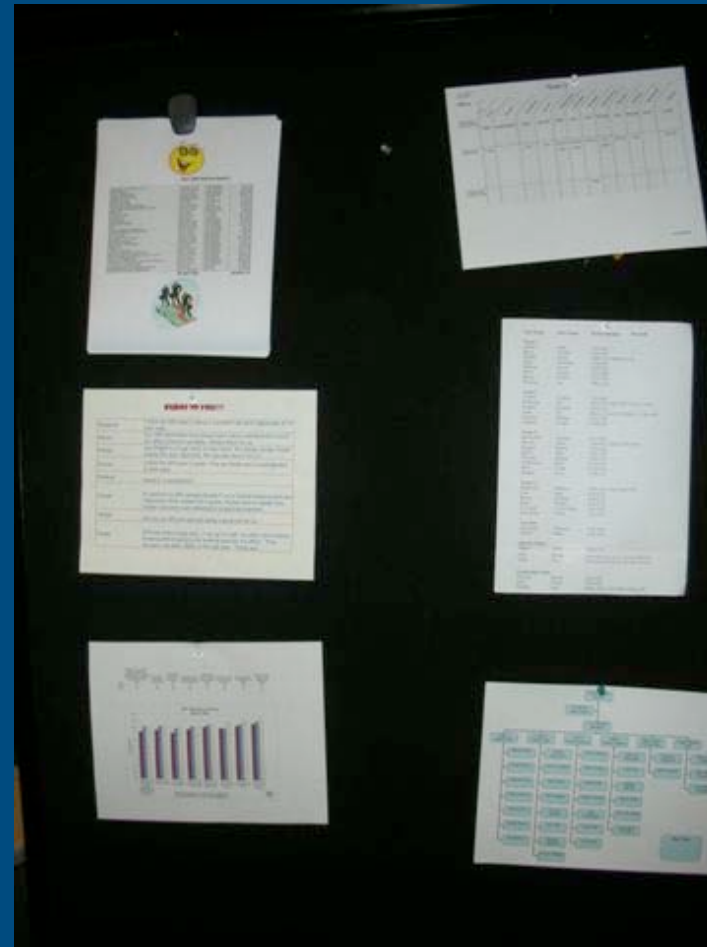
Group Proposal Services

Team Dashboards

Front



Back



Group Proposal Services

Controls: Daily Status Snapshot

New Inventory Breakdown

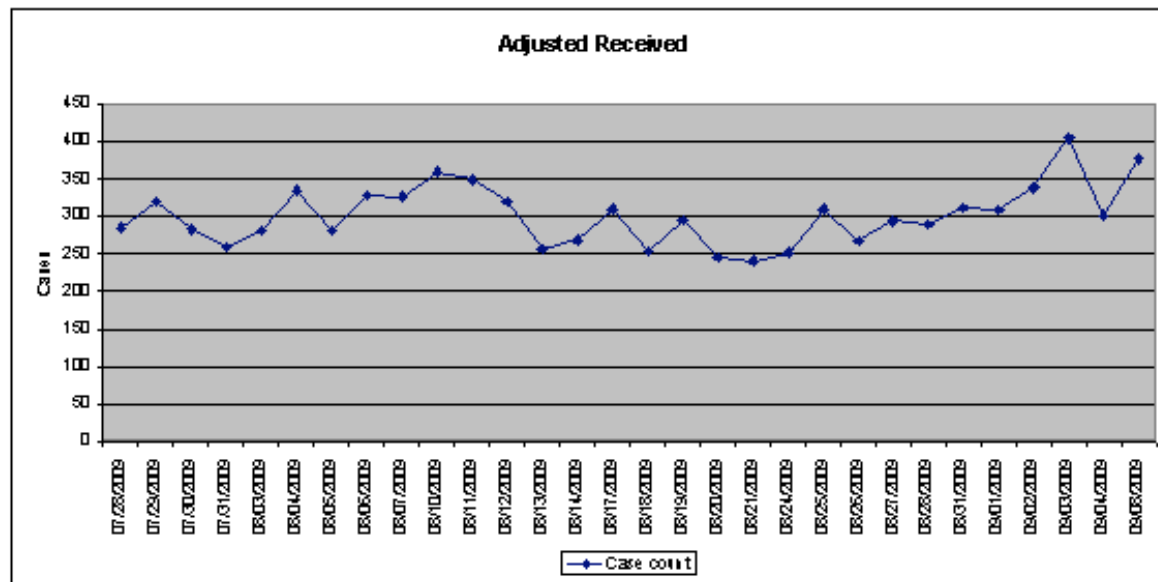
Team 1

Office	Rush	All Others	YESTERDAY				TODAY				Active Totals	U/W	Missing Info	Grand Totals
			Midnight - 10 AM	10 AM - Noon	Noon - 2 PM	After 2 PM	Midnight - 10 AM	10 AM - Noon	Noon - 2 PM	After 2 PM				
Charlotte	0	7	0	0	0	5	0	0	0	0	12	2	3	17
Dallas	0	40	4	11	2	9	0	0	0	0	66	8	2	76
Nashville	0	12	5	2	1	8	0	0	0	0	28	5	2	35
New England	0	25	8	0	5	17	0	0	0	0	55	0	8	63
Raleigh	0	0	1	0	0	0	0	0	0	0	1	0	1	2
TOTALS:	0	84	18	13	8	39	0	0	0	0	162	15	16	193

Group Proposal Services

Controls: Incoming Volume Trends

Adjusted Received Counts



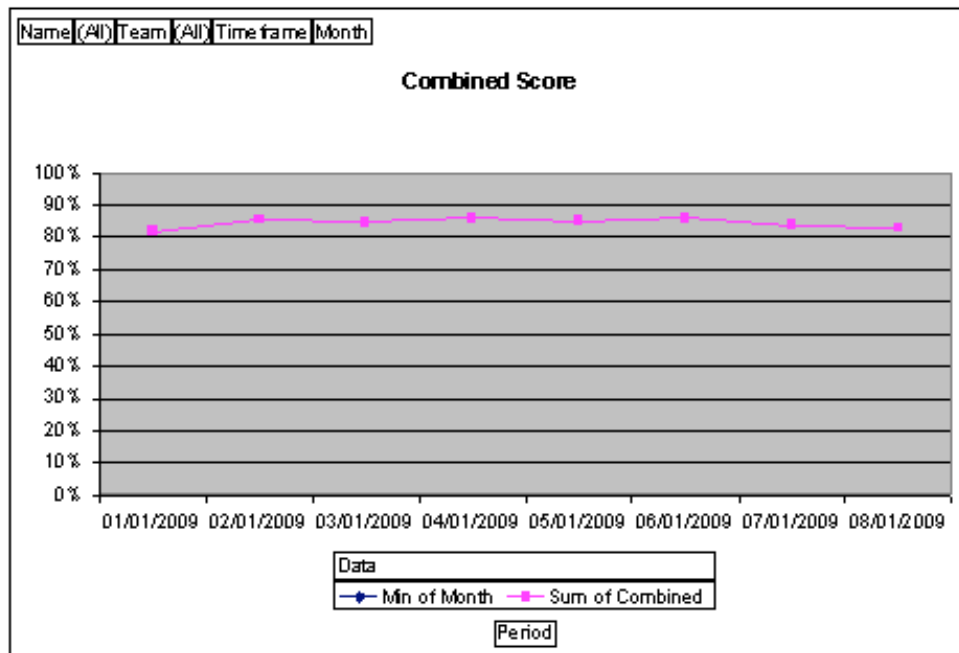
Office	(All)
Team	(All)

Cases	
Adj Date	Total
07/28/2009	285
07/29/2009	320
07/30/2009	283
07/31/2009	260
08/03/2009	281
08/04/2009	335
08/05/2009	282
08/06/2009	328
08/07/2009	327
08/10/2009	360
08/11/2009	349
08/12/2009	320
08/13/2009	256
08/14/2009	269
08/17/2009	310
08/18/2009	253
08/19/2009	295
08/20/2009	245
08/21/2009	241
08/24/2009	252
08/25/2009	310
08/26/2009	268
08/27/2009	294
08/28/2009	289
08/31/2009	312
09/01/2009	309
09/02/2009	338
09/03/2009	405
09/04/2009	302
09/08/2009	377
Grand Total	9,055

Group Proposal Services

Controls: Quality Trends

August 2009 QUALITY SCORE



Name	(All)
Team	(All)

ReviewType	# Of Quotes Reviewed	Actual % Score	% Defect Free	Combined Score
Random Audit	1466	98%	71%	85%
Office Feedback	156	96%	38%	YTD
Transition	1072	95%	46%	
Grand Total	2694	96%	59%	

Department Avg Combined Score-YTD			
ReviewType	Actual % Score	% Defect Free	Combined Score
Random Audit	98%	71%	85%

Name	(All)
Team	(All)
Month	08.01/2009

ReviewType	# Of Quotes Reviewed	Actual % Score	% Defect Free	Combined Score
Office Feedback	23	96%	39%	68%
Random Audit	201	98%	68%	83%
Transition	166	95%	43%	69%
Grand Total	390	96%	56%	76%

Group Proposal Services

Work Time Regression Equation

Regression Analysis: Total versus Versions, Lives, ...

The regression equation is

Total = 12.5 + 3.05 Versions + 0.249 Lives + 14.0 Multi-location + 16.9 LTD
 + 14.4 VTL - 6.71 Census Manipulation + 22.4 Benefit Choice
 + 14.9 Missing Info + 8.86 Underwriting

Predictor	Coef	SE Coef	T	P	VIF
Constant	12.544	2.429	5.16	0.000	
Versions	3.047	1.044	2.92	0.005	1.1
Lives	0.24877	0.05817	4.28	0.000	1.7
Multi-lo	13.968	3.266	4.28	0.000	1.5
LTD	16.904	3.020	5.60	0.000	1.2
VTL	14.362	3.136	4.58	0.000	1.3
Census M	-6.711	2.453	-2.74	0.008	1.5
Benefit	22.432	5.884	3.81	0.000	1.2
Missing	14.864	5.526	2.69	0.009	1.5
Underwri	8.863	3.707	2.39	0.019	1.1

S = 8.956 R-Sq = 77.9% R-Sq(adj) = 75.2%

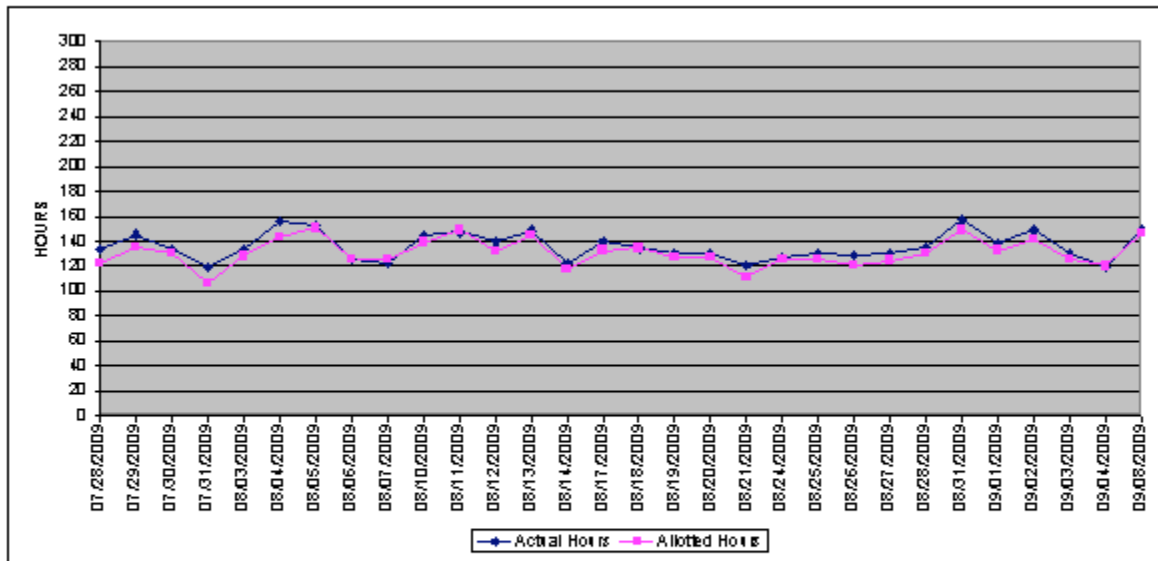
Analysis of Variance

Source	DF	SS	MS	F	P
Regression	9	21170.7	2352.3	29.33	0.000

Group Proposal Services

Controls: Dept Productivity Trends

Department Quote Time



DISPLAYED:

TYPE: QUOTE TIME
 RAN: Daily
 SLICE: Department
 PERIOD: 07/29/2009 TO 09/08/2009

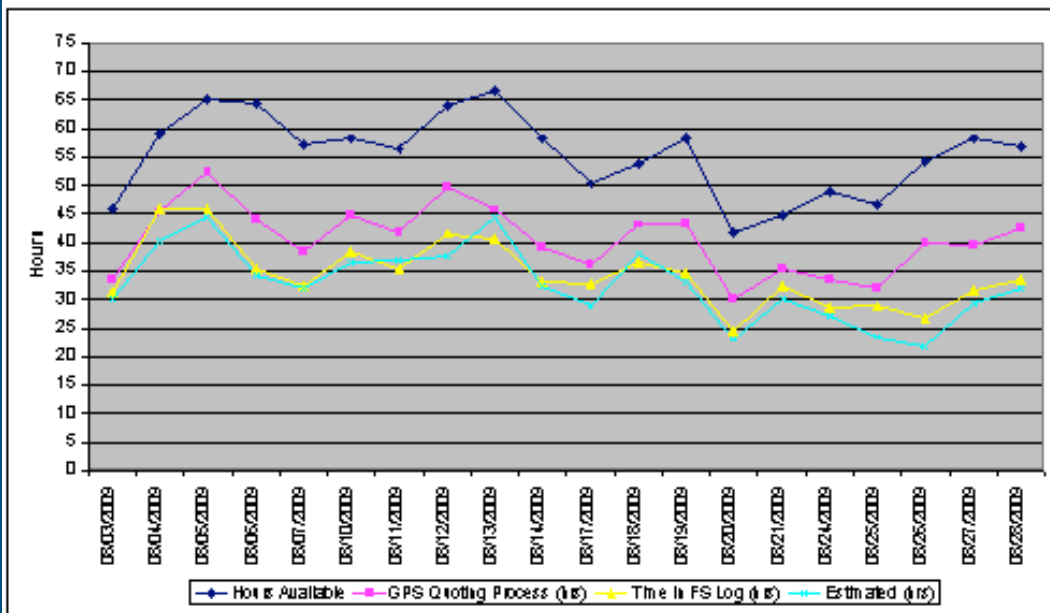
FSL Office (All)

Data				
Adj Day	Case Count	Actual Hours	Allotted Hours	Difference
07/28/2009	264	133.4	122.3	109.1%
07/29/2009	308	146.6	135.6	107.4%
07/30/2009	299	133.1	131.0	101.6%
07/31/2009	254	119.1	106.1	112.2%
08/03/2009	290	133.7	128.2	104.3%
08/04/2009	324	155.9	143.4	108.7%
08/05/2009	331	152.1	150.7	100.9%
08/06/2009	262	126.2	126.3	100.0%
08/07/2009	286	122.3	125.8	97.2%
08/10/2009	320	144.3	139.1	103.7%
08/11/2009	332	147.5	148.8	99.1%
08/12/2009	279	139.6	132.1	105.7%
08/13/2009	325	148.6	144.7	102.7%
08/14/2009	258	122.3	117.8	103.8%
08/17/2009	299	139.8	132.8	105.3%
08/18/2009	279	134.5	134.6	99.9%
08/19/2009	301	130.3	127.5	102.2%
08/20/2009	281	129.7	127.2	101.9%
08/21/2009	239	121.1	111.2	108.9%
08/24/2009	279	127.7	125.7	101.5%
08/25/2009	272	130.4	125.9	103.6%
08/26/2009	275	129.2	121.0	106.7%
08/27/2009	266	130.7	124.7	104.9%
08/28/2009	281	135.7	130.6	103.9%
08/31/2009	341	157.1	149.1	105.4%
09/01/2009	287	138.4	132.8	104.2%
09/02/2009	320	149.2	141.7	105.3%
09/03/2009	300	129.6	126.0	102.8%
09/04/2009	247	119.7	120.0	99.7%
09/08/2009	343	149.6	146.4	102.2%
Grand Total	8,742	4,076.0	3,929.1	103.7%

Close correlation of predicted and actual work time.

Group Proposal Services

Controls: Team Productivity Trends



Team 1

Data						Summary		
Adj Days	Case Count	Hours Available	GPS Quoting Process (hrs)	Time In FS Log (hrs)	Estimated (hrs)	Time In FS Log (hrs) / GPS Quoting Process (hrs)	Time In FS Log (hrs) / Estimated (hrs)	GPS Quoting Process (hrs) / Hours Available
08/03/2009	70	45.9	33.6	31.2	30.1	92.9%	103.7%	73.2%
08/04/2009	87	59.0	45.4	46.0	40.3	101.3%	114.1%	76.9%
08/05/2009	109	65.1	52.4	46.0	44.3	87.8%	103.8%	80.5%
08/06/2009	78	64.3	44.1	35.5	34.2	80.5%	103.8%	68.6%
08/07/2009	74	57.2	38.4	32.3	32.1	84.1%	100.6%	67.1%
08/10/2009	83	58.2	44.7	36.4	36.5	85.9%	105.2%	76.8%
08/11/2009	83	56.4	41.9	35.4	36.8	84.5%	96.2%	74.3%
08/12/2009	85	64.1	49.8	41.6	37.8	83.5%	110.1%	77.7%
08/13/2009	92	66.6	45.8	40.6	44.3	88.6%	91.6%	68.8%
08/14/2009	80	58.2	39.0	33.0	32.3	84.6%	102.2%	67.0%
08/17/2009	64	50.3	36.2	32.7	28.8	90.3%	113.5%	72.0%
08/18/2009	80	53.8	43.1	36.5	38.1	84.7%	96.8%	80.1%
08/19/2009	77	58.5	43.2	34.5	33.2	79.9%	103.9%	73.8%
08/20/2009	55	41.7	30.0	24.4	23.1	81.3%	105.6%	71.9%
08/21/2009	63	44.7	35.4	32.5	30.1	91.8%	108.0%	79.2%
08/24/2009	63	49.1	33.5	28.6	27.1	85.4%	105.5%	68.2%
08/25/2009	51	46.7	31.9	28.8	23.5	90.3%	122.6%	68.3%
08/26/2009	56	54.1	39.9	26.7	21.7	66.9%	123.0%	73.8%
08/27/2009	60	58.2	39.4	31.8	29.2	80.7%	108.9%	67.7%
08/28/2009	66	56.7	42.6	33.6	32.1	78.9%	104.7%	75.1%
Grand Total	1,476	1,108.8	810.3	690.1	655.6	85.2%	105.3%	73.1%

Available = “paid to be in the building” (not on PTO, etc)

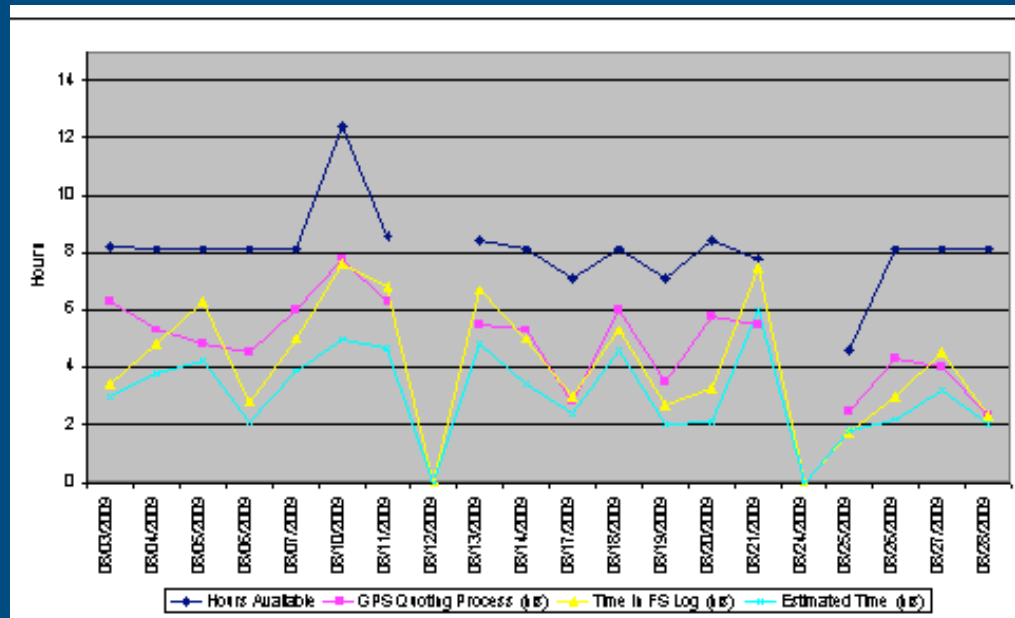
Quoting = “assigned to production work” (not in meetings, etc)

FS Log = “self-reported quoting time”

Estimated = “predicted by regression equation”

Group Proposal Services

Controls: Indiv Productivity Trends



SSSName: [REDACTED]

Adj Date	Case Count	Hours Available	GPS Quoting Process (hrs)	Time in FS Log (hrs)	Estimated Time (hrs)	Time in FS Log (hrs) / GPS Quoting Process (hrs)	Time in FS Log (hrs) / Estimated Time (hrs)	GPS Quoting Process (hrs) / Hours Available
08/03/2009	7	8.2	6.3	3.4	3.0	54.0%	113.3%	76.8%
08/04/2009	8	8.1	5.3	4.8	3.8	90.6%	126.3%	66.4%
08/05/2009	11	8.1	4.8	6.3	4.2	131.3%	150.0%	59.3%
08/06/2009	7	8.1	4.5	2.8	2.1	62.2%	133.3%	55.6%
08/07/2009	11	8.1	6.0	5.0	3.9	83.3%	128.2%	74.1%
08/10/2009	10	12.4	7.8	7.6	5.0	97.4%	152.0%	62.9%
08/11/2009	10	8.6	6.3	6.8	4.7	107.9%	144.7%	73.3%
08/12/2009	0	0	0.0	0.0	0.0			
08/13/2009	10	8.4	5.5	6.7	4.8	121.8%	139.6%	65.5%
08/14/2009	8	8.1	5.3	5.0	3.4	94.3%	147.1%	66.4%
08/17/2009	4	7.1	2.8	3.0	2.4	107.1%	125.0%	39.4%
08/18/2009	12	8.1	6.0	5.3	4.6	88.3%	115.2%	74.1%
08/19/2009	7	7.1	3.5	2.7	2.0	77.1%	135.0%	49.3%
08/20/2009	7	8.4	5.8	3.3	2.1	66.9%	157.1%	69.0%
08/21/2009	8	7.8	5.5	7.5	6.0	136.4%	125.0%	70.5%
08/24/2009	0	0	0.0	0.0	0.0			
08/25/2009	5	4.6	2.5	1.7	1.8	68.0%	94.4%	54.3%
08/26/2009	6	8.1	4.3	3.0	2.2	69.8%	136.4%	53.1%
08/27/2009	7	8.1	4.0	4.5	3.2	112.5%	140.6%	49.4%
08/28/2009	4	8.1	2.3	2.3	2.0	100.0%	115.0%	28.4%
Grand Total	142	145.5	88.5	81.7	61.2	92.3%	133.5%	60.8%

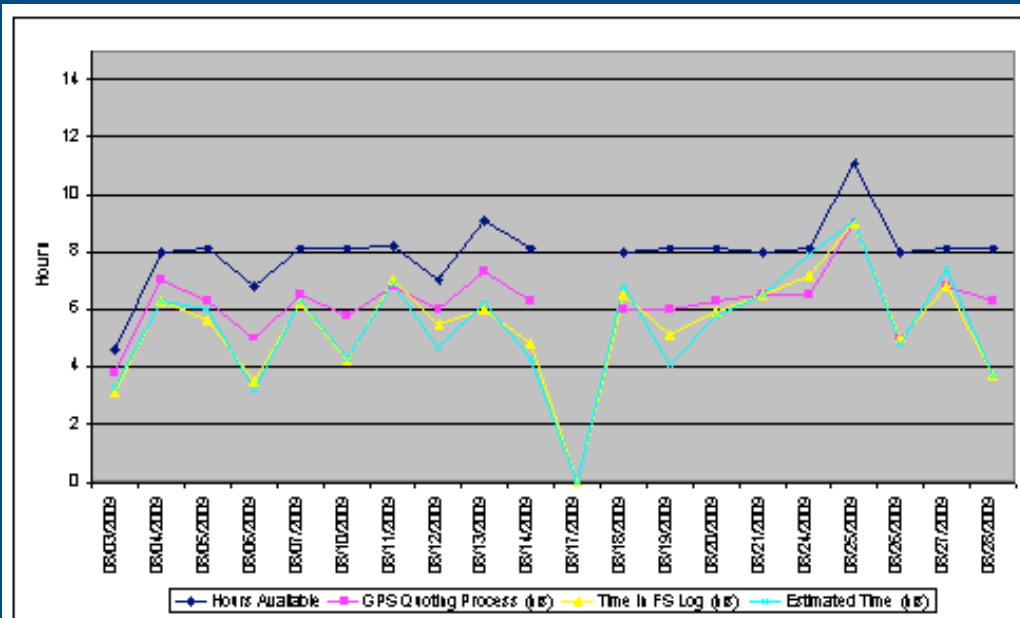
DISPLAYED:

Example of diverging predicted and actual work time.

More variation in individual performance than team.

Group Proposal Services

Controls: Indiv Productivity Trends



DISPLAYED:

SSSName

Adj Date	Case Count	Hours Available	GPS Quoting Process (hrs)	Time in FS Log (hrs)	Estimated Time (hrs)	Time in FS Log (hrs) / GPS Quoting Process (hrs)	Time in FS Log (hrs) / Estimated Time (hrs)	GPS Quoting Process (hrs) / Hours Available
08/03/2009	8	4.6	3.8	3.1	3.3	81.6%	93.9%	82.6%
08/04/2009	16	8.0	7.0	6.3	6.3	90.0%	100.0%	87.5%
08/05/2009	13	8.1	6.3	5.6	6.0	88.9%	93.3%	77.8%
08/06/2009	9	6.8	5.0	3.5	3.2	70.0%	109.4%	73.5%
08/07/2009	15	8.1	6.5	6.2	6.3	96.4%	96.4%	80.2%
08/10/2009	8	8.1	5.8	4.2	4.3	72.4%	97.7%	71.6%
08/11/2009	14	8.2	6.8	7.0	6.9	102.9%	101.4%	82.9%
08/12/2009	10	7.0	6.0	5.5	4.7	91.7%	117.0%	85.7%
08/13/2009	14	9.1	7.3	6.0	6.2	82.2%	96.8%	80.2%
08/14/2009	13	8.1	6.3	4.8	4.3	76.2%	111.6%	77.8%
08/17/2009	0	0.0	0.0	0.0	0.0			
08/18/2009	15	8.0	6.0	6.5	6.8	108.3%	96.6%	75.0%
08/19/2009	12	8.1	6.0	5.1	4.1	85.0%	124.4%	74.1%
08/20/2009	14	8.1	6.3	5.9	5.8	93.7%	101.7%	77.8%
08/21/2009	15	8.0	6.5	6.5	6.5	100.0%	100.0%	81.3%
08/24/2009	16	8.1	6.5	7.2	7.9	110.8%	91.1%	80.2%
08/25/2009	18	11.1	9.0	9.0	9.1	100.0%	96.9%	81.1%
08/26/2009	10	8.0	5.0	5.0	4.8	100.0%	104.2%	62.5%
08/27/2009	18	8.1	6.8	6.8	7.4	100.0%	91.9%	84.0%
08/28/2009	12	8.1	6.3	3.7	3.7	98.7%	100.0%	77.8%
Grand Total	250	151.7	119.2	107.9	107.6	90.5%	100.3%	78.6%

GOAL 85 - 90% GOAL 90 - 110% GOAL 70 - 75%

Example of a more experienced individual with closer predicted and actual work time.



Group Proposal Services

Controls: Cross-Training Status

Team 4					
Office Name	Main Contact	status	Backup(s)	status	Backup from other team
Detroit	Trisha	done	Melissa	done	Gabrielle
Grand Rapids	Trisha	done	Wendy	done	Jill, Craig
Indy	LynneMarie	done	Trisha, Shannon	done	Jill, Craig, Jenna
Cincinnati	Khai				Kenzie, Lisa
Chicago	Wendy	done	Melissa, Trisha	done	Jan
Milwaukee	Melissa R	done	Wendy	done	Sonja
Seattle	Shannon	done		done	Morgan
Portland	Shannon	done	Melissa	done	Lisa, Kenzie
St Louis	Khai	done	Lynne Marie	done	Kenzie
Kansas City	Khai	done	Lynne Marie, Wendy	done	Kristina, Jenna

Cross-training status is a leading indicator of flexibility!



Results

- The team owns the work and the results!
 - Employees collaborate without explicit leader direction
- Employee morale is high
- Productivity vastly increased:
 - Staffing reduced through attrition (no layoff!) over 2 years from 65 to 38 people, handling the same volume of work!
 - Cost savings of \$1.1 million per year
- Cycle time cut in half to 24-48 hours, with dramatic, sustained increase in customer satisfaction

Questions?

