



TRANSFORMATION TO UNLOCK GROWTH

- **Client:** Principal Financial Group®
- **Business Area:** Annuities Operations
- **Opportunity:** Transform processes, systems, measures, and culture to enable scalable growth
- **Approach:**
 - Streamlined processes to remove handoffs between triage and processing teams
 - Devised a “Priority Protection” scheme in the call center to concentrate available time and get operational work done
 - Deployed team measures, goals, and visual control boards to align the team on a mission of 24-hour turnaround of all work
- **Results:**
 - Improved 24-hour turnaround from 66% to 95% and sustained that performance over time
 - Absorbed a 2.5x volume spike while staying within service-level agreement for all processes