

INDUSTRY

Financial Services

SOLUTION

Operations and Technology

PRODUCTS

Operational Excellence Design

CLIENT STORY

Finding Insight Behind the Scenes:

Insurance Company Improves Back-Office Operations by 20%

A leading Canadian insurer offers general, life, and health insurance products and services to more than 4 million customers via physical branches, the Web, and call centers. Though not customer-facing, its back-office operation — especially email, fax, and other document processing — is an important contributor to the company's success. The insurer's continuous improvement group wanted to find a way to eliminate unnecessary waste in its back-office operations.

The company had acquired a few smaller companies over the years, and as a result the back-office team was stuck working with multiple systems and client databases, each with their own processes, data fields, and customer support activities. In addition, the company didn't have a good handle on the performance of back-office employees. It had tools to measure the time employees took to complete tasks, but they didn't go far enough to measure employee productivity and whether they were focused on the right types of activities.

We teamed up with the company to assess the current back-office situation and take steps to improve staff utilization. The team developed a workforce planning and management methodology to allow the client to quantify volume and capacity needs for back-office operations and align staffing to meet customer demand. In addition, it leveraged existing tools to create dashboards that enabled real-time decision making, supported better operational reporting and provided clear line-of-sight for managing employee performance.

Specifically, the team conducted time studies, created training materials, coached leaders on workforce management issues, and set up new reporting capabilities to more accurately reflect employees' productivity.

The result was a more optimized back office. Operations improved by 20 percent, and employee engagement rose because the staff could now focus their attention on the efforts that mattered most. The streamlined operation also freed up some of the staff to move out of the back office to support customer-facing activities or fill needs elsewhere in the company.

RESULTS

Improved back-office productivity by **20%**

Moved **significant staff** out of the back office

Employee engagement **increased**