

Case study – Defined Benefits Service Provider



Business Process Redesign & Improvement and Organizational Change Management

Re-Engineer Implementation Process

Business Objective & Challenge

A Defined Benefits (DB) Service Provider needed to reduce overall cost and duration of DB implementations. The goal was to reduce per-client and per-participant costs, improve allocation of resources from all involved business areas, and significantly improve the viability of the DB product among large and middle market clients.

To accomplish this the end-to-end client on-boarding implementation process needed to be redesigned and the DB team needed to assess the readiness for change while maintaining the same technology footprint.

Collaborative Solution

To meet its objectives, the DB Service Provider engaged Collaborative Consulting to facilitate a fundamental reengineering of its onboarding implementation business process

A team of Collaborative business process management and organization change management experts:

- Developed a vision and value proposition with the cross-functional team to guide the redesign process performance goals and measurements
- Identified, educated, and facilitated a cross-functional team in the redesign for the end-to-end enterprise
- Detailed process activities in an integrated fashion; process, role, capabilities, responsibilities and tools
- Tested the redesign to ensure business objectives were met and key processes were flexible to meet the requirements of different types of implementations
- Designed a change program that included; associate support mechanism, communications, education strategy and implementation, incentive alignment, workforce analysis, change readiness , as well as longer term feedback and assessments
- Encouraged the identified of quick hits to enable short term benefits
- Designed an online process playbook to enable ongoing support and learning

Results

The result of the engagement was an improved on-boarding process that reduced the core implementation team from 23+ core roles to 12 and reduced the total implementation hours for large projects by 30 % and medium projects by 15% thereby reducing implementation cost to meet business KPIs goals.

Additionally, there was an organizational realignment in roles and responsibilities across the enterprise, a consistent enterprise training program (on-shore and off-shore), and communication and management practices to support the new process.