

TREXIN CASE STUDY

CORRECTING SYSTEMIC BUSINESS PROCESS AND SYSTEM INTEGRATION ISSUES

Trexin partnered with a \$3B high-growth life and annuity company to work across their new business area.

BUSINESS DRIVER

The COO and annuity business GM needed to understand on-going, systemic issues for New Business customer service and operations. Marketing's view of sales performance/customer feedback (negative & losing share) was disjointed from operation's own view (green scorecards). Specific issues and opportunities to be addressed included:

- Inconsistent service vs. best-in-class standards; deterioration of service over 18 months
- Un-orchestrated changes to operating model
- Limited reports and end-to-end measures
- Looking to enable Straight Thru Processing

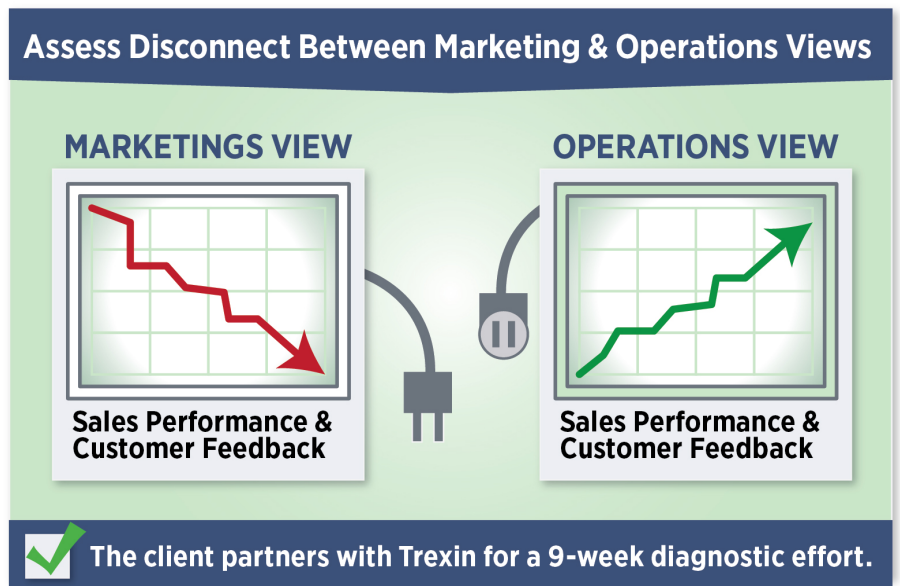
APPROACH

A joint client/Trexin team performed a fast-paced, 9-week diagnostic and roadmap effort. Activities included 20+ interviews, collection of business and process metrics, in-flight assessments, a JIT customer service NPS survey, capture of industry benchmarks, and an x-functional discovery "one set of facts" workshop. Root-cause and gap/solution workshops included leaders and staff across all 19 work groups. A data correlation POC illustrated the value of time-phased analysis of customer service feedback and operational service levels (time, cost, quality). Finally, a 14-stream, stepwise corrective action roadmap was developed, reviewed, and resourced.

RESULTS

Marketing, operations, and IT began working together with an aligned view of customer needs and service levels. Specific outcomes and deliverables included:

- Aligned, enterprise wide "One set of facts" (people, process & technology)
- New end-to-end outcome and agent metrics
- Common aligned view of problem and solution across appropriate executives
- Updated and clarified go-to-market strategy aligned with operating service levels
- Action plan and roadmap prescribing ready-to-implement corrective actions
- Ability to quantify customer service feedback and correlate to operation performance
- New diagnostic tools and models



CONTACT US

Financial Services Practice
fs@trexin.com
www.trexin.com