

Case Study: Capacity and Resource Management for a Leading Financial Institution

I. Description

An executive vice president of operations was looking for a unique solution to manage the growing volume of transactions at his branches. The unusual growth required excessive overtime from his employees, creating a drain on profits and morale. Ultimately, this had a negative impact on customers and reduced the banks ability to retain some of its key clients.

II. Methodology

- Analyzed branch and back-office activity by transaction type for Credit, Clearing, Loan, and Deposit operations
- Eliminated Non-Value Added activities and optimized workflow
- Created a Parametric Staffing model and implemented a resource planning system to manage dynamic workload changes
- Instituted a Multi-Disciplined Workforce concept, resulting in a more flexible back-office capacity

III. Results Achieved

Within one quarter, overtime was cut down to less than 5%, with an accompanying increase in profit. Customer satisfaction rose by 20%, and customer retention reached 95%. Cost of service was reduced by 25%, along with increased employee satisfaction.

**Specific project results are proprietary. For more information regarding this case study or to request an introductory meeting, email us at info@tefen.com.*