

# Research & Benchmarking Services

## OpsDog Case Studies

### Client A

(Timeframe: 3-6 days)

#### Top 10 Consulting Firm

North America

➤ **OUR CUSTOMER:**  
**Senior Consultant**

➤ **PROJECT DESCRIPTION:**

Development of relevant metrics (and related definitions) and identification of comparable benchmarking data for U.S. health insurance payers on both the regional and national levels.

➤ **SCOPE OF PROJECT:**

- Claims
- Provider Services
- Call Center Operations
- Member Services
- Member On-boarding

➤ **DELIVERABLES:**

- Benchmarking Report (PDF)
- Benchmarking Data Set (Excel)
- Detailed Metric Documentation (Excel)

➤ **OUTCOME:**

Much of the required data was already in OpsDog's database. Our project sponsor's use of the deliverables was two-fold: the data was used in presentations to high-level clients across two engagements with major U.S. health insurance providers, and was then re-used in sales/marketing literature.

### Client B

(Timeframe: 2-4 weeks)

#### Top 5 Consulting Firm

North America

➤ **OUR CUSTOMER:**  
**Project Manager**

➤ **PROJECT DESCRIPTION:**

Development of relevant metrics (and related definitions) and identification of comparable benchmarking data for U.S. commercial lending operations for banks of greater than 10,000 employees.

➤ **SCOPE OF PROJECT:**

- Sales & Business Development
- Loan Origination
- Loan Servicing
- Call Center Operations
- Portfolio Risk Management

➤ **DELIVERABLES:**

- Benchmarking Report (PDF)
- Benchmarking Data Set (Excel)
- Detailed Metric Documentation (Excel)

➤ **OUTCOME:**

Our research helped the team to identify a large gap related to commercial loan origination costs within the client's organization. The data was cited in a presentation to the CFO of a top 5 U.S. bank. Prior to the presentation, we worked with our customer and his team to ensure that they had a solid understanding of the data and metrics that we provided.

### Client C

(Timeframe: 4-8 weeks)

#### Mid-Size Utilities Provider

North America

➤ **OUR CUSTOMER:**  
**Chief Operating Officer**

➤ **PROJECT DESCRIPTION:**

Identification of relevant metrics and corresponding definitions, calculation instructions and benchmarking data for use in reporting and analysis for a mid-size (500 employees) regional electricity distributor.

➤ **SCOPE OF PROJECT:**

- Operations & Maintenance
- Customer Service
- Engineering & Construction
- Information Technology
- Finance
- Procurement
- Human Resources

➤ **DELIVERABLES:**

- Benchmarking Report (PDF)
- Benchmarking Data Set (Excel)
- Executive Summary Presentation (PDF)
- Detailed Metric Documentation (Excel, PDF)

➤ **OUTCOME:**

Our team collaborated with the Chief Operating Officer over the course of 2 months to define a set of valuable, easy-to-understand KPIs. We then conducted research to collect comparable data for each metric (from both internal and external sources), and provided a 120-page report and corresponding Excel data set that was used to identify improvement areas and set company performance targets.



# Best Practices Identification

## OpsDog Case Studies

### Client A

(Timeframe: 3-6 days)

#### Small Utilities Provider

North America

➤ **OUR CUSTOMER:**  
**Chief Operating Officer**

➤ **PROJECT DESCRIPTION:**

Assessment of existing business issues and overall company objectives to inform research and development of detailed best practices to better train employees, set customer service level agreements (SLAs) and audit existing business processes.

➤ **SCOPE OF PROJECT:**

- Operations & Maintenance
- Customer Service
- Finance
- Procurement
- Human Resources

➤ **DELIVERABLES:**

- Best Practices Guide (PDF)
- Employee Job Aids (PDF)

➤ **OUTCOME:**

Our team drew heavily upon our previous experience in the utilities industry to provide the client with a detailed collection of best practices that required no new technology to implement within day-to-day operations. We also provided 5 one-page employee job aids (“quick guides”) for specific roles within the organization. The job aids were built assist employees in following defined best practices and understanding performance expectations.

### Client B

(Timeframe: 4 weeks)

#### Mid-Size U.S. Retailer

North America

➤ **OUR CUSTOMER:**  
**Chief Supply Chain Officer**

➤ **PROJECT DESCRIPTION:**

Assessment of industry best practices, specifically in regards to order management, procurement and warehousing within the retail industry. Development of detailed best practices and employee job aids to assist in implementation throughout the business.

➤ **SCOPE OF PROJECT:**

- Order Management
- Procurement
- Warehousing
- Quality Assurance

➤ **DELIVERABLES:**

- Best Practices Guide (PDF)
- Manager Meeting Agendas (PDF)
- Employee Job Aids (PDF)

➤ **OUTCOME:**

We performed extensive external research to identify many proven leading practices for the selected supply chain-related functions that were in scope. We provided a comprehensive guide describing identified best practices (more than 80 total), developed employee job aids to ensure the adherence to these best practices, and also provided managers with tools to regularly enforce the use of best practices.

### Client C

(Timeframe: 8-12 weeks)

#### Top 25 U.S. Bank

North America

➤ **OUR CUSTOMER:**  
**EVP of Digital**

➤ **PROJECT DESCRIPTION:**

Review of competitive landscape and overall digital customer experience to develop best practices related to the design and use of mobile applications to perform banking transactions and interact with customer service representatives.

➤ **SCOPE OF PROJECT:**

- Consumer Lending
- Payments & Transfers (Digital)
- Merchant Services
- Customer Service

➤ **DELIVERABLES:**

- Competitor Analysis (PDF)
- Mobile Application Assessment (PDF)
- Best Practices Guide (PDF)

➤ **OUTCOME:**

Our team compared the client's digital capabilities to that of other peer banks to understand areas where they could potentially gain a competitive advantage. We then developed a detailed guide outlining design, usability and function-related best practices for mobile applications in the banking sector. These findings were used to inform application development efforts, prioritize application features and develop a business case for further digital investment.



# Process Modeling & Analysis

## OpsDog Case Studies

### Client A

(Timeframe: 3-6 days)

#### Small Mortgage Lender

North America

- **OUR CUSTOMER:**  
**Branch Manager**
- **PROJECT DESCRIPTION:**  
The client sought to review existing loan sales and origination (from prospecting through loan closing) processes to identify areas where employee productivity, customer service and overall work quality could be improved without implementing costly new technology.
- **SCOPE OF PROJECT:**
  - Prospecting & Lead Generation
  - Application Data Collection
  - Application Processing
  - Underwriting
  - Closing
- **DELIVERABLES:**
  - Future State Process Maps (PDF, Visio)
  - Improvement Recommendations (PDF)
- **OUTCOME:**  
Through remote process mapping exercises, our analysis team was able to document the client's current processes in great detail. Through analysis of their existing processes, we identified over 50 activity-level process improvements that could be implemented without new technology. We then developed a future state process model for use in change management and employee training.

### Client B

(Timeframe: 4 weeks)

#### Mid-Size U.S. Retailer

North America

- **OUR CUSTOMER:**  
**Chief Operating Officer**
- **PROJECT DESCRIPTION:**  
The client needed to review existing Human Resources and Finance processes in order to control shared services costs and identify areas where existing capacity could be re-allocated, while also gearing the business up for future growth.
- **SCOPE OF PROJECT:**
  - Accounts Payable (AP)
  - Collections
  - Financial Planning & Analysis (FP&A)
  - Recruiting & Hiring
  - Talent Management
- **DELIVERABLES:**
  - Future State Process Maps (PDF, Visio)
  - Improvement Recommendations (PDF)
  - Employee Job Aids (PDF)
- **OUTCOME:**  
Our team documented the company's current state processes through a series of remote interviews and process modeling sessions. Through a collaborative review of their existing processes, our teams identified more than 250 activity-level improvement opportunities that could be implemented quickly with no major investment. Our detailed future state process models served as the blueprint for optimizing workflows within the shared services organization.

### Client C

(Timeframe: 12 weeks)

#### Top 50 U.S. Bank

North America

- **OUR CUSTOMER:**  
**SVP of Retail Banking**
- **PROJECT DESCRIPTION:**  
Our customer was tasked with improving the profitability of the bank's retail branch network and consumer lending operations. They knew that there was considerable room for improvement, but lacked process-level detail related to where and how their current work flows could be optimized.
- **SCOPE OF PROJECT:**
  - Retail Branch (Teller Tasks)
  - Retail Branch (Platform Sales)
  - Loan Origination
  - Loan Servicing
- **DELIVERABLES:**
  - Future State Process Maps (PDF, Visio)
  - Improvement Recommendations (PDF)
  - Employee Job Aids (PDF)
- **OUTCOME:**  
Our team worked collaboratively with client staff to document their current processes in detail, and understand existing bottlenecks and "pain points." We drew on our database of best practices to develop detailed future state process models and guides to assist both non-technology and IT-related improvement efforts across the business.





# KPI Consulting

## OpsDog Case Studies

### Client A

(Timeframe: 3-6 days)

#### Mid-Size Utilities Provider

North America

##### ➤ OUR CUSTOMER:

**Director of IT Operations**

##### ➤ PROJECT DESCRIPTION:

Selection of high-value KPIs for in-scope business units and development of detailed KPI documentation. With a focus on IT, the client required detailed KPI specifications to ensure application developers could properly implement data in management dashboards.

##### ➤ SCOPE OF PROJECT:

- Operations & Maintenance
- Engineering
- Energy Efficiency Programs
- Information Technology
- Finance
- Customer Service

##### ➤ DELIVERABLES:

- Customized KPI Encyclopedia (PDF)
- Detailed KPI Documentation (PDF, Excel)

##### ➤ OUTCOME:

Our team drew on previous experience within the utilities industry to recommend a set of valuable KPIs for each in-scope organizational area. We then worked with employees from each area to validate the KPIs. Finally, we built detailed documentation that outlined how to capture and calculate each selected KPI.

### Client B

(Timeframe: 4 weeks)

#### Large Manufacturer

EMEA Region

##### ➤ OUR CUSTOMER:

**Chief Technology Officer**

##### ➤ PROJECT DESCRIPTION:

Research and development of KPIs to measure IT Department effectiveness, from an end user perspective. This required detailed KPI documentation to assist the client in extracting and calculating selected KPIs to measure IT performance on a regular basis.

##### ➤ SCOPE OF PROJECT:

- Application Management
- Desktop Support
- Infrastructure Management
- Security Monitoring

##### ➤ DELIVERABLES:

- Customized KPI Encyclopedia (PDF)
- Detailed KPI Documentation (PDF, Excel)
- Data Capture Sheets (Excel)

##### ➤ OUTCOME:

Our team worked collaboratively with IT leadership to develop a set of 50 KPIs to measure performance across the selected IT functions. Once the set of KPIs had been agreed-upon, we developed highly detailed documentation to assist IT staff in performing the appropriate calculations to derive the KPIs. We also developed manual data capture sheets, or templates, to track data that could not be generated in an automated fashion.

### Client C

(Timeframe: 10 weeks)

#### International Financial Exchange

EMEA Region

##### ➤ OUR CUSTOMER:

**Chief Risk Officer**

##### ➤ PROJECT DESCRIPTION:

Research and development of detailed metrics and related documentation for use in risk management across the organization. Each metric, over 800 total, required a full page to detail the definition, calculation formula, measurement rules, etc.

##### ➤ SCOPE OF PROJECT:

- Information Technology
- Information Security
- Finance
- Procurement
- Human Resources
- Capital Market Operations
- Legal & Compliance

##### ➤ DELIVERABLES:

- Customized KPI Encyclopedia (PDF)
- Detailed KPI Documentation (PDF, Excel)
- Executive-level KPI Summary (PPT)

##### ➤ OUTCOME:

Our team collaborated with the Chief Risk Officer over the course of two months to develop a set of use-able, easy-to-understand metrics to monitor risk throughout the organization. The information is being used to design management dashboards & prepare for an upcoming initial public offering (IPO).





# Dashboard Design & Development

## OpsDog Case Studies

### Client A

(Timeframe: 2 weeks)

#### Top 50 U.S. Bank

North America

##### ➤ OUR CUSTOMER:

**Director of Business Intelligence**

##### ➤ PROJECT DESCRIPTION:

Assessment of existing data warehouse contents (SQL Server 2012), detailed documentation of existing data sources (to support ETL processes) and development of interactive dashboards to assist in managing various functions within the bank.

##### ➤ SCOPE OF PROJECT:

- Retail Branch Operations
- Loan Origination
- Loan Servicing
- Underwriting
- Call Center

##### ➤ DELIVERABLES:

- Interactive Dashboards (Microsoft Power BI)
- Detailed Metric Documentation (PDF)
- Report Directory & Specifications (PDF)

##### ➤ OUTCOME:

Our research and past experience helped to identify the KPIs that were most vital to the areas in scope. We designed and built specifications for several reports to inform our staff in configuring dashboards for their sales, loan processing and customer service organizations. Dashboards were developed in Microsoft Power BI and published throughout the organization.

### Client B

(Timeframe: 3-6 weeks)

#### Mid-Size Health Plan

North America

##### ➤ OUR CUSTOMER:

**Chief Technology Officer**

##### ➤ PROJECT DESCRIPTION:

Analysis of existing data architecture, development of KPI documentation and supporting management report specifications to aid the OpsDog team in development and publication of more than 20 dashboards using the client's selected technology platform.

##### ➤ SCOPE OF PROJECT:

- Claims
- Customer Service/Call Center
- Provider Credentialing & Setup
- New Member Enrollment

##### ➤ DELIVERABLES:

- Interactive Dashboards (Tableau)
- Detailed Metric Documentation (PDF)
- Report Directory & Specifications (PDF)
- Ongoing Support

##### ➤ OUTCOME:

OpsDog produced detailed technical specifications for each report to be built, including thorough definitions of each vital KPI and the corresponding data source(s). We then transformed the client's existing data and configured real-time, interactive reports (built in Tableau) for use across the organization.

### Client C

(Timeframe: 6-12 weeks)

#### Mid-Size P&C Insurer

North America

##### ➤ OUR CUSTOMER:

**Chief Information Officer**

##### ➤ PROJECT DESCRIPTION:

Audit of existing data warehouse structure, recommendation of various improvements to data capture and tracking methods to improve report contents and development of more than 35 interactive reports for use across the business.

##### ➤ SCOPE OF PROJECT:

- Finance
- Human Resources
- Customer Service
- Sales (Agency Operations)
- Application Processing
- Claims

##### ➤ DELIVERABLES:

- Interactive Dashboards (Tableau)
- Detailed Metric Documentation (PDF)
- Report Directory & Specifications (PDF)
- Ongoing Support

##### ➤ OUTCOME:

Our team collaborated with the CIO to audit the organization's existing reports to determine areas where they could enrich existing data to improve business intelligence effectiveness. We worked with their IT Team to implement audit findings, and develop a set of user-friendly, interactive dashboards for use by more than 1,500 employees.

