Process Modeling & Analysis

OpsDog Case Studies

Client A
(Timeframe: 3-6 days)

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Small Mortgage Lender
North America

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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)

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Mid-Size U.S. Retailer
North America

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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)

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Top 50 U.S. Bank
North America

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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.

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