

opsdog

BPMN 2.0 FORMAT

INVESTMENT/ASSET MANAGEMENT

Retirement Services

The OpsDog Financial Services Hierarchy

- Investment/Asset Management
 - Insurance
 - Banking
 - Broker Dealer
 - Consumer Finance
- Equities Research
- Portfolio Installation
- Trade/Transaction Support
- Retirement Services**
 - Retirement Services
- Mutual Funds
- Real Estate Investment Trust (REIT)
- Accounting & Reporting
- Client Services
- Distribution

www.OpsDog.com | info@OpsDog.com | Phone: 201.526.1200 | www.TheLabConsulting.com

Retirement Services: Workflow

- A Caller Identification
- B Discovery & Resolution

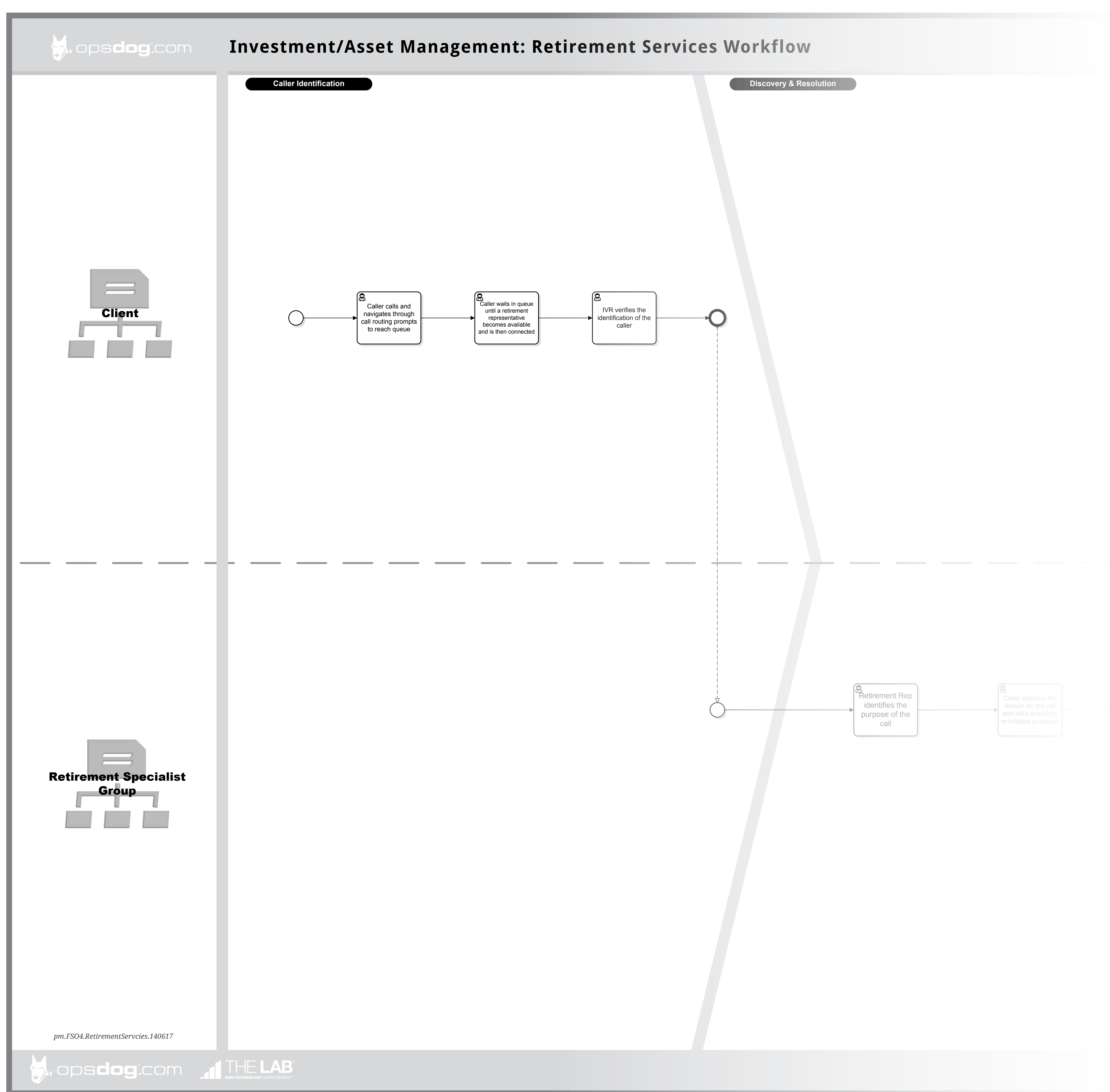
Workflow Description

The reception of incoming calls from prospective customers related to retirement services. Includes call routing, customer identity verification, retirement services information package request and the fielding of any questions related to retirement services.

Legend

- Start Event
- Intermediate Event
- End Event
- Gateway
- Group
- Task
- Expanded Sub-Process
- Pool
- Sequence Flow
- Message Flow

DO-IT-YOURSELF BUSINESS PROCESS IMPROVEMENT WORKFLOW



Login to **OpsDog** to purchase the full workflow template (available in PDF, Visio, PPT)

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