

BACKGROUND:

The Certificates Issuance process caters to clients by issuing Insurance Certificates to the Customer Service Representative (CSR).

PROBLEM:

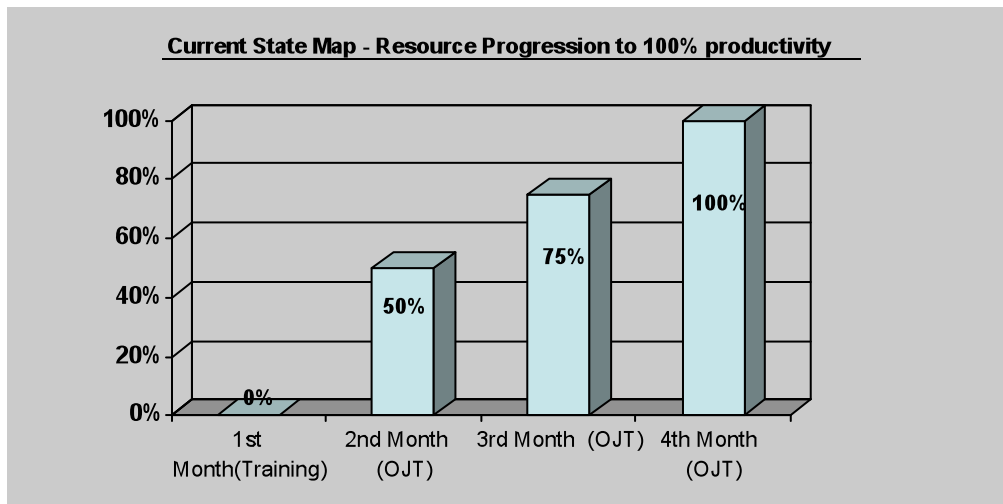
The large numbers of locations and accounts under each process have different standards and hence it's difficult for an individual to be proficient. In addition with the increase in volumes it would be impractical to train all the new resources on all accounts before being deployed onto production.

OBJECTIVE:

The objective of the project is to reduce training time from 4 weeks to 3 weeks and On Job Training (OJT) for full productivity from 12 weeks to 5 weeks. This would translate to a 50% reduction in time for new resource to hit 100% productivity.

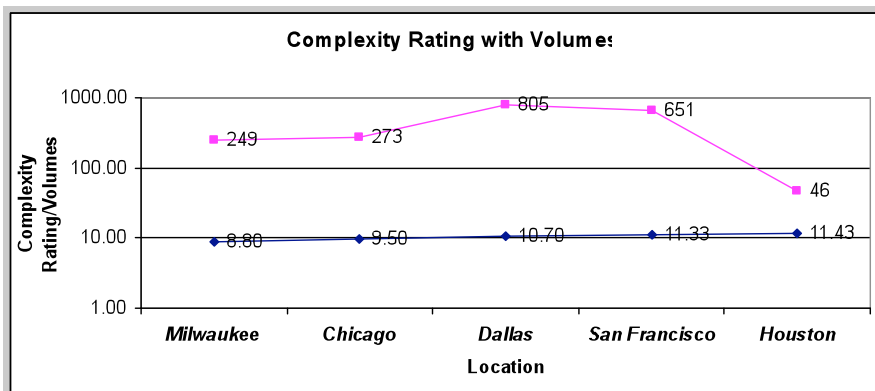
APPROACH:

Hence the idea is to have resources specialize in some locations at first and then graduate to other locations.



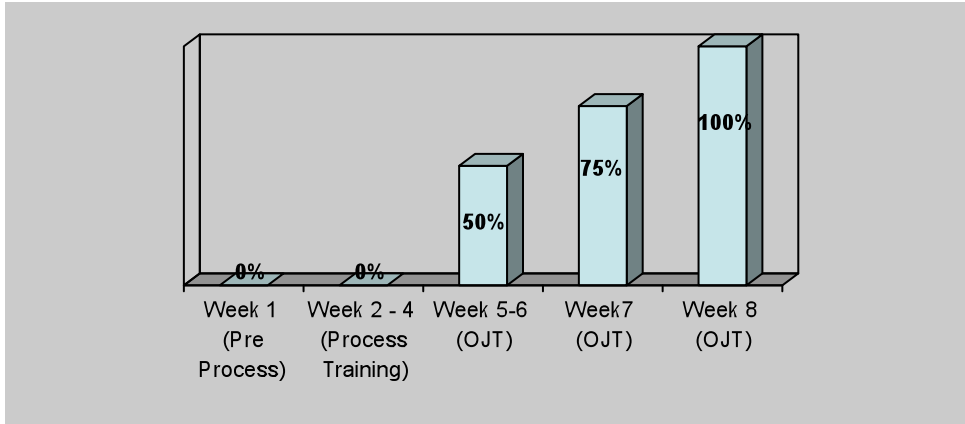
The current state for progression to 100% productivity would take close to four months inclusive of OJT.

Further understanding on specialization each location is rated based on the complexity. The factors influencing on complexity are *Number of Inputs*, *Standard Operating Procedure (SOP)*, *Rush Request & Loadings*. The idea was to identify those locations that were relatively less complex and has significant volumes.

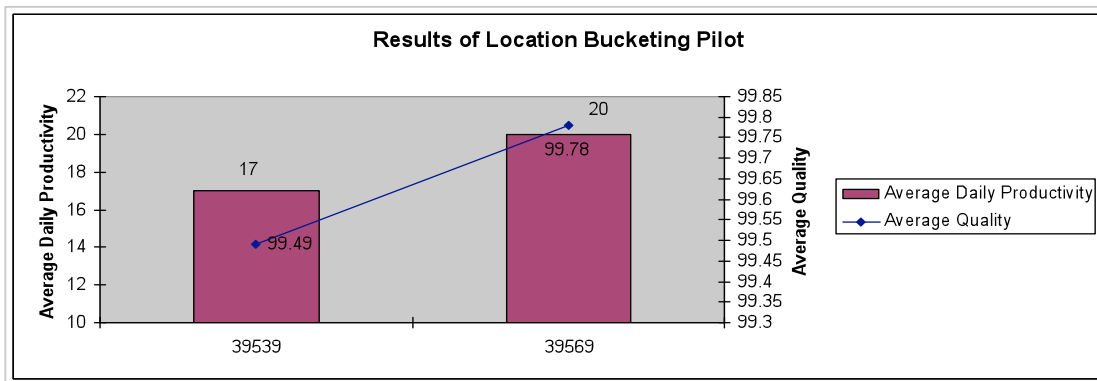


Thus it was decided that Dallas and San Francisco would be the first locations that a new resource would be trained on because of lesser complexity rating and high volumes.

The implementation was carried out on a pilot batch and results were evident:



Decreasing from 4 months to 2 months and other benefits are increase in productivity and Quality



Benefits:

- The training specialization project would reduce the time for 100% productivity by 50%.
- The career progression of a resource has now been defined which would make production planning easier.
- The location bucketing pilot showcased an increase in productivity and quality in the 2 week period.

Lessons Learnt:

Some of the points that were incorporated in this training based on inputs from the earlier batch were:

- On the first day of process training all resources were checked for their typing skills in order to ascertain if anyone needed special attention.
- There was more emphasis on *Confirmnet* training – this was extended by another day when compared to the previous batch so that the new resources were well versed with not just delivering Certs but also reissuing, resending and excluding Certs.
- We also did away with the earlier practice of initially practicing on excel and got the team directly onto *Confirmnet* Demo.

Things we would do differently:

- The results of the training specialization pilot would be analyzed for any changes.
- The location bucketing pilot would be implemented and results tested again for tangible and intangible benefits at the end of a month.
- Any new location that is added can be analyzed for complexity and would appropriately be fit into the career progression graph.
- A long term goal would be to look at standardization across locations.