Ocmulgee

EVIDENCE-BASED CASE STUDY

Financial services | Small company

A 20-person wealth firm cuts client-process lead time by 60.4%: Technology and data

FINANCIAL SERVICES | SMALL | TECHNOLOGY AND DATA

-60.4%	72%	-290
CLIENT-PROCESS LEAD TIME [1]	PROCESS EFFICIENCY [1]	MOVEMENTS PER CYCLE [1]

PROBLEM

The annual client-valuation process took more than two hours and contained five non-value-added steps. Excess movement and paper handling increased effort without improving the client output.

SOLUTION

Researchers mapped the 16-step process, removed five steps, and redesigned the remaining work around customer value. The future-state flow reduced handoffs, movement, and documents while preserving the required valuation work.

RESULT

Lead time fell from 2:03:11 to 0:48:46. Process efficiency reached 72%, with 290 movements and nine paper sheets removed per cycle.

BUSINESS LENS

Porter: faster service and lower overhead support differentiation in a trust-based market with strong buyer choice.

ASSUMPTIONS AND LIMITS

One pilot process, no control group, and possible observation effects. The source's 186-person-day estimate is excluded because its repetition basis is ambiguous.

DEPARTMENT APPLICATION

TECHNOLOGY AND DATA

The process map exposed hidden waiting.

Application analysis based on the cited source. It is not a separate measured result.

Prepared by Ocmulgee Business Process Solutions from the cited independent source. This is not an Ocmulgee client engagement or an original Ocmulgee result.

SOURCE [1]

Douglas et al., 2012. Applying Lean Principles to a Professional Service Firm: Findings from a Pilot Study.
https://www.researchgate.net/publication/275958504

Academically reviewed conference case | Size basis: 20 employees, including 5 administrators.