



Case Study: Driving Process Excellence at a Large Investment Bank

I. Description

A mid-sized investment bank was not meeting profit goals and believed that it was uncompetitive in the areas of Foreign Exchange and Credit Operations. These areas were requiring significant hand-offs, coupled with inadequate management reporting capabilities to track individual and team performance.

II. Methodology

- Benchmarked metrics for cost per transaction and personnel per transaction, with a correlation to workload, volume, and staff availability
- Implemented Performance Improvement Plan, including training, procedures, and reduced staffing levels to accommodate the streamlined process
- Adapted a Metrics Management tracking system

III. Results Achieved

Tefen created a successful reporting and scheduling system for the bank, linking performance to individual and team processes. The bank immediately saw a sustainable 30% reduction in cost per transaction, even with a 20% reduction in personnel.

**Specific project results are proprietary. For more information regarding this case study or to request an introductory meeting, email us at info@tefen.com.*