

My project was for a small fee-only financial planning firm to implement a new client on-boarding process. Our initial current state showed a great deal of re-work and waiting, due to errors. Most of this was resolved by implementing standard work and work leveling. We stabilized our process fairly quickly and have been able to start a new project to fill our pipeline. With the improvements we have made, we were able to increase our business even though we lost an FTE who we did not have to replace. The greatest win has been our team taking ownership of identifying and eliminating waste!