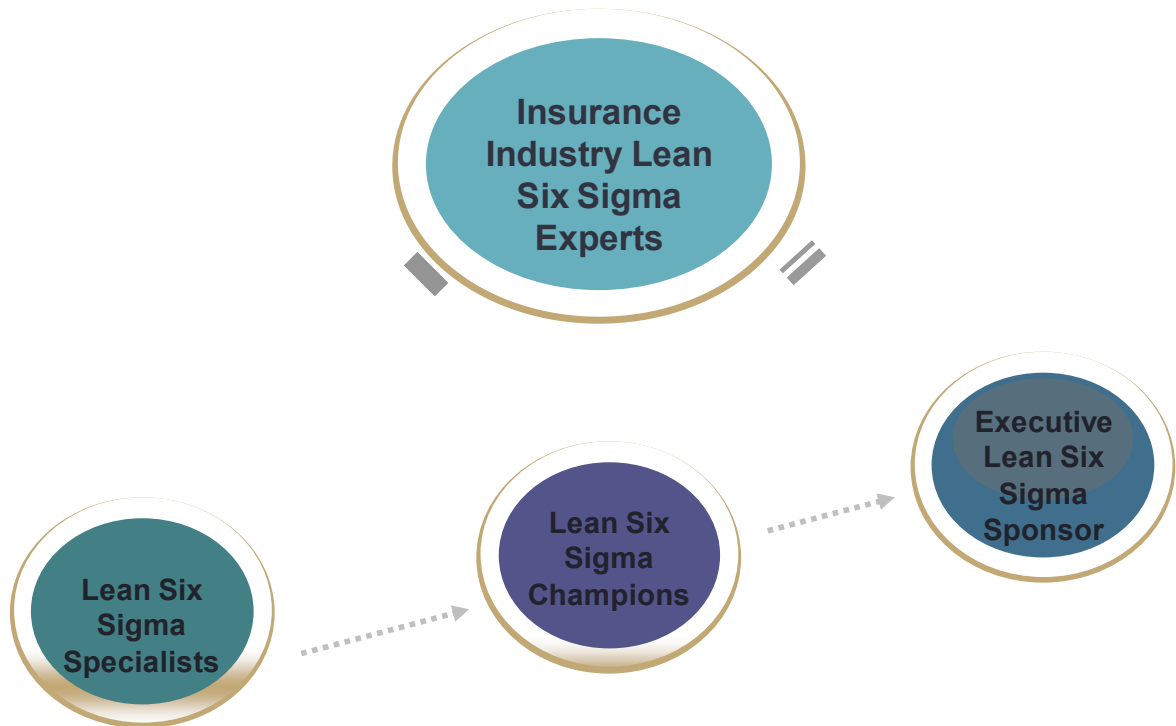




Lean Six Sigma for Insurance

Program Overview



What Is It?

Specialized Lean Six Sigma Training Program for Insurance Organizations

- Applies Lean principles and adapts established methodologies (e.g. Six Sigma) to the specialized needs of the insurance industry
- Focuses on building operational effectiveness within complex service organizations
- Achieves measurable improvements in both transactional processes that lend themselves to a statistical approach as well as non-transactional processes
- Supports both customized and standardized service models

Delivers Highest ROI for Insurance Organizations

- Delivers highest ROI for Insurance organizations than any other training in the marketplace
- Supports improvement projects that work for your organization's culture and priorities

Sustainable Improvements and Scalability of Knowledge

- Focuses on knowledge and skill building that can be applied across the organization
- Builds leadership and skills to drive improvements in operational productivity
- Develops operational productivity problem-solving expertise within your organization
- Utilizes proven Lean Six Sigma tools, methodologies and techniques to achieve strategic goals and meet practical business needs
- Combines classroom training with hands-on “lab” applications
- Provides long-term mentoring to support practical learning and build your depth of expertise
- Offers progression of levels and scope to fill a variety of organizational roles
- Establish champions for improvement at multiple levels of the organization

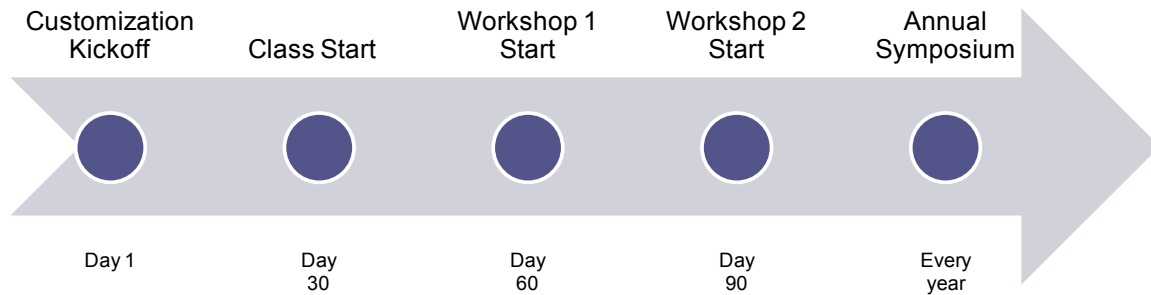
Executive Sponsor Certification

- Enables effective management engagement and participation in a customized coaching session

Program Description

Core Ingredients

- Core program suitable for participants at all levels of the organization
- 2 levels (Specialist and Champion) build for increased depth and greater levels of responsibility
- 2-day Customization Kickoff to enable PPI to customize course content based on your organization's unique culture and context
- 3-day classroom attendance, followed by three 2-day workshops
 - Workshops are held 1 month apart
- Additional complementary specialized certifications available
 - Transactional services
 - Performance metrics
- Course structure
 - 4 sessions of classroom training/workshops
 - Small groups with emphasis on participation and instructor interaction
 - Each session is followed by extended practical “lab” work to reinforce principles and apply techniques in action
- Instructors act as mentors for individual participants throughout the course and remain available to participants for ongoing advice and support up to a year after the course concludes



Specialist

- Introductory level course, leading to certification as Lean Six Sigma Specialist
- Provides awareness and training in fundamental principles and techniques for Lean Six Sigma process improvement, including:
 - Interviewing, note-taking, and consultative data-gathering
 - Principles of process analysis and opportunity identification
 - Effective use of key Lean Six Sigma tools and techniques

Champion

- Advanced level course, leading to certification as Lean Six Sigma Champion
- Open to PPI-certified Lean Six Sigma Specialists
- Reinforce and extend concepts introduced in Specialist course
- Additional Champion content includes focus on:
 - Greater depth and complexity
 - More tools
 - Project management
 - Change management

Executive Sponsor Certification Level

- 2 hour one-on-one coaching session
- Executive summary of Lean Six Sigma Champion course, Transactional course, and Metrics course
- Lean Six Sigma Executive Sponsor Certification
- Additional Topics:
 - Selling Lean Six Sigma to the organization
 - Leveraging skills of the organization
 - Identifying and prioritizing opportunities for improvement

Ongoing Support from PPI Mentors

- Participants in both Specialist and Champion courses are assigned an individual Mentor to provide continuing guidance and support
- Participants can call on their Mentor to answer questions, provide advice and suggestions, and guide them through challenges as they gain expertise and confidence in the practice of Lean Six Sigma Improvement
- The Mentor remains available to certified Specialists and Champions on an ongoing basis for up to a year following completion of the course
- The organization has the option to retain the continuing support of Mentors for additional time, on negotiable terms

Annual Best Practices Symposium

- Annual reunion of all PPI-certified Specialists and Champions at the organization, together with all Executive Sponsors and invited guests
- Symposium members can discuss their projects, challenges, and triumphs, share their experiences, and exchange best practices and lessons learned
- An opportunity to reinforce a culture of improvement and extend communication across organizational lines to support common goals and strategy

Lean Six Sigma for YOU

A Customization Kickoff precedes every program

- 2-day PPI on-site visit where we get to know your organization and improvement context
- Areas we will focus on during the Kickoff include:
 - Your organizational culture
 - Past training experiences
 - Improvement successes and failures
 - Current major strategic initiatives and priorities
 - Competing projects
 - Participant profiles
- Based on what we learn, we will customize our courses to meet your needs

Specialized Certifications (Optional)

Open to PPI-certified Lean Six Sigma Champions

Transactional Services

Additional training focused on statistical tools and techniques that support improvement in areas of transactional standardization (e.g. Call Center, Billing, Claims)

Performance Metrics

Additional training focused on design and implementation of effective performance metrics, e.g.

- Identify and align appropriate input and output metrics
- Design and apply leading measures to support proactive decision-making

Sample Course Topics

Specialist/Champion

- Team formation, facilitation, and decision-making
- Management and planning tools
- Communication with project sponsors, staff, peers and competitors
- Quality and improvement approaches, including:
 - DMAIC
 - PDCA
 - Continuous Improvement
- Approaches to data gathering and information
 - Quantitative & qualitative
 - Selecting appropriate tools
- Process analysis, including:
 - Process flows
 - SIPOC
 - Task decomposition
 - Relational matrices
 - Roles, responsibilities and competency alignment
 - Technology assessment
- Opportunity identification and analysis, including:
 - Value-added analysis
 - Capacity analysis
 - Gap analysis
 - Pareto analysis
 - Heat maps
 - Risk analysis
- Improvement implementation
 - Business case
 - Getting buy-in
 - Change management
 - Determining ROI
 - Sustaining improvements
- Case studies

Transactional Services

- Identifying when statistical analysis is appropriate
- Selecting the right statistical tools

Performance Metrics

- Identifying what needs to be measured
- Aligning metrics to goals and strategy
- Dashboards and scorecards
- Implementing and refining

Why Lean Six Sigma for Insurance?

Lean Six Sigma is Becoming THE Improvement Framework for the Industry

A recent survey of Key Operational Productivity trends finds:

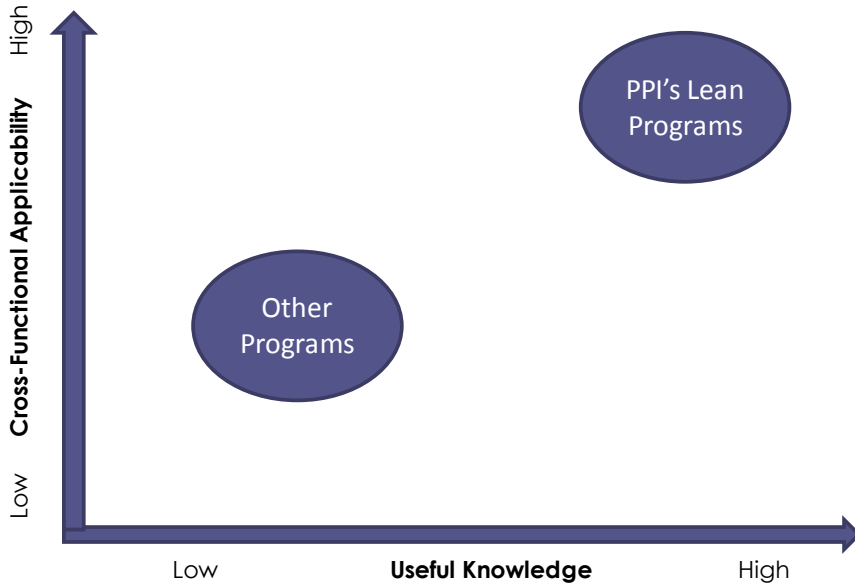
- 50% of Financial Services firms have implemented Lean Six Sigma concepts
- Over 60% of Financial Services firms are expanding their Process Improvement efforts
- Over 65% of Financial Services firms will focus their Operational Excellence projects on Process Redesign work
- Over 68% of Financial Services firms will make their key investments in training in process improvement tools and methodologies

Many Improvement Efforts Encounter Barriers to Success



Benefits of Insurance-Specific Lean Six Sigma Training

- Process focused vs. transactional focused
- Takes into account customization
- Addresses challenges of multiple products
- Considers needs for end-to-end process views
- Accounts for increased need for faster ROI
- Considers critical role of project sponsors
- Adaptable to ever changing regulations



PPI's Lean Six Sigma Programs – Knowledge Based vs. Tools Based

Result = Breadth and depth of knowledge with wide applicability

PPI's Lean Six Sigma Programs vs. the Marketplace

Includes:	Other Programs	PPI's Programs
Six Sigma Methodologies and Tools	✓	✓
Operational Excellence Certifications	✓	✓
Take away Reference Materials	✓	✓
Industry Specific		✓
Instructors are also Lean Six Sigma Practitioners		✓
Mentoring program with insurance specific Operational Productivity experts		✓
Knowledge and concept based with supporting tools		✓
Wide breadth, scalability, and applicability of concepts learned		✓
Core consulting skills training (e.g., interviewing, note taking, documenting, benchmarking)		✓
Both Pre and Post Program Assessments		✓

Why PPI?

Standard Six Sigma and Lean approaches attempt to create holistic standards for improvement effort that apply across the board.

But we know that model doesn't fit the highly customized Insurance industry.

Why PPI Lean Six Sigma for Insurance?

- Customized to the Insurance Industry and to your nuances
- Built and taught by experts in process improvement
- Focuses on what actually works in the field - best practices that generate efficiencies
- Combines skills & techniques for powerful knowledge transfer
- Sponsorship Coaching accents acceptance
- Results in application to better prioritized initiatives for the organization and greater ROI

For more information contact us at: <http://www.performanceplusinc.com>

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