

Eliminate Waste  
Improve Customer Experience  
Grow Revenue

## LeanSigma<sup>®</sup> Fundamentals for Financial Services

LeanSigma Fundamentals is a two-day introductory workshop for executive and operational leaders from banks, credit unions, outsourced processors as well as casualty, property, and life insurance companies. It is designed to help participants understand how to leverage the power of LeanSigma<sup>®</sup> within their own organizations to deliver unprecedented performance.

Guidon's LeanSigma Fundamentals for Financial Services workshop is an ideal starting point for organizations interested in learning how to apply our unique fusion of Lean and Six Sigma methodologies to improve the customer experience, reduce operational lead times, and drive efficiency.

### About Guidon

Guidon Performance Solutions pioneered the fusion of Lean and Six Sigma in the financial services sector to help organizations reduce waste, streamline processes, enhance productivity and improve the customer experience.



"Guidon consultants have walked in our shoes thru past financial services leadership experiences. They understand our challenges and speak our language. They have not only helped us leverage LeanSigma principles within our organization, but are transferring knowledge that builds our intellectual capital."

Paul Johnson  
Symcor, Director of Process Management



# LeanSigma® Fundamentals for Financial Services

## How You Will Benefit

At our two-day LeanSigma Fundamentals for Financial Services workshop you will learn how and why LeanSigma methodologies are so effective in improving delivery from sales to service, including operations and fulfillment.

See how you can leverage the power of LeanSigma to yield these typical results:

- Cut end-to-end service delivery time from days or weeks to hours
- Dramatically improve the customer experience as well as employee satisfaction levels
- Better match capacity to volume to improve delivery, reduce cost, and improve quality
- Increase efficiencies and save money in ways that are often overlooked

## What You Will Learn

- How to get your transformation started using LeanSigma processes while addressing the need for cultural development that is an essential part of a Lean transformation
- The essential principles of Lean and how to see and dramatically reduce non-value-adding activities that take up 90% or more of a typical process
- Begin practicing Lean principles and tools by leveraging a hands-on simulation and experience how collaboration and speed drive dramatic improvements
- How to maintain momentum and rally your entire organization around the improvement objectives

## Who Should Attend?

- Financial Services and insurance professionals including Executive Vice Presidents, Vice Presidents, Assistant Vice Presidents and other managers
- Process Improvement or Continuous Improvement leaders
- Black Belt or Green Belts interested in better leveraging the tools and principles of Lean and cultural transformation to better execute and sustain workflow transformations

## Guidon's Promise

Guidon unconditionally guarantees your absolute satisfaction. If for any reason you are not satisfied with a Guidon workshop, we will refund 100% of your attendance fee.

## Terms and Conditions:

You will be invoiced for the workshop fees which are due in full prior to the start of the workshop. Fees include workshop materials, lunch and refreshments.

## Cancellation Policy

Cancellations must be received in writing. Cancellations received within six to ten business days of the workshop will be subject to a 50% cancellation fee. Cancellations received within five business days of the workshop will be subject to a 100% cancellation fee. Guidon reserves the right to cancel any workshop where sufficient registration levels have not been met.

## WORKSHOP AGENDA

DAY

1

### Introduction and Expectations

**Time-based Strategy**  
Reduce customer cycle-time and simultaneously improve service, cost and quality

**LeanSigma® Execution Principles and Methodology**

**Simulation**  
Experience the Current State

**The Customer and Specifying Value**  
Express value from the customer's perspective and in terms of a specific service

**Identifying the Value Stream**  
Mapping the value-added and non-value added steps involved in bringing a service to the customer

**Establishing Flow**  
The continuous movement of service and information throughout the entire process

**Pull from the Customer**  
The process flow activated by customer demand that signals the need for a service

DAY

2

### Continuation

**Simulation**  
Apply and Develop the Future State

**Simulation**  
Experience the Improvement

**Continuously Improve, Eliminate Root Cause and Sustain Impact**  
Completely eliminate waste so that all tasks create value for the customer

**Cultural Transformation**  
Creating the desired culture

**Wrap-up**

## FEES

Visit [GuidonPS.com](http://GuidonPS.com) for tuition information.

## Register Today

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