



Highgate understands that while there may be multiple companies performing the same task or transaction, not all companies process or perform in the same manner. We can help improve your operational efficiencies and customer experience. It is here where our industry experts really shine...**“they know their stuff!”**

We've already established the 'how' we get to know you, so let's describe on the 'where' we utilize this knowledge.

As your relationship builds with your consultant he/she will be able to identify areas, operationally, that may benefit from an industry expert review. We bring to the process the knowledge of what leading companies in your industry are doing, how they do it and – importantly – why they do it. You will have access to industry-leading knowledge that Highgate gathered in its many years of relationships with financial services firms.

## Benefits of the Review

The organization can benefit from a review when problem areas, related causes and alternatives are analyzed and changes are implemented. Obvious benefits include improvement of customer service, increased system efficiency, improvement in security, reduction of Company risk, efficient use of staff, decreased expenses and increased profitability.

## Our Approach

Our approach involves a general review of existing operational practices, interviews with members of staff at various levels, departments and branches and observation of the workflow. An extensive review of all products and services offered are conducted. Findings are documented and recommendations for improvement are outlined. As a last step assistance with the implementation of the approved recommendations is provided.

- Perform a general review of existing operational practices
- Interview member of staff at various levels, departments and branches
- Observe workflow while in departments and branches
- Conduct a review of all products and services offered
- Document findings and make recommendations for improvement
- Assist with implementation of the approved recommendations

## What do you have to do?

It's quite simply...

- Provide Organization Chart
- Provide Organization Chart for each Department or Branch
- Employee profiles
- Policy Manual
- Procedures Manual
- YOUR specific objectives

It's really that simple.

Call us to see how our experts can help your organization!