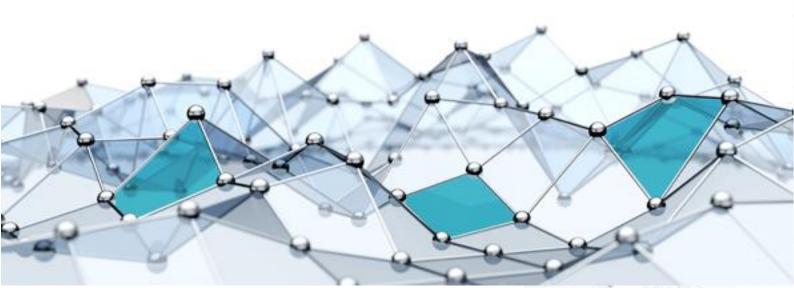# VALUEVIEW®
MAKING WORK MORE VALUABLE

Making work meaningful

Business case study

ValueView® at SGB Bank SA, an innovative approach to

measuring the profitability of positions and processes

SGB Bank SA

Poznan 2016

The case
SGB Bank SA

SGB Bank SA was faced with the task of optimizing its processes and the need for restructuring. When conventional analysis methods used to describe and design processes failed, the bank opted for ValueView®. This allowed the bank to carry out a number of structural changes, to optimize its processes and to implement a new strategy.
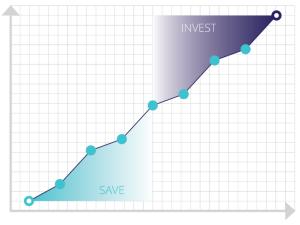
At the end of 2013 it became necessary for the bank to optimize processes and to restructure its organization. For the preparation of these changes, analytical methods of process description and design were applied. They brought the expected outcomes in the form of dimensioned tasks, but covering only repeatable positions not subject to change. Several hundred positions in the bank headquarters were not dimensioned due to a great labour intensity of the analytical process, considerable variety and constant structural changes of the tasks performed in these positions. **The management did not have the tools to assess their profitability and the data to make restructuring decisions.**

SGB-Bank SA is an associating bank of Cooperative Banking Group, with approx. 650 people on board. It unites almost 200 Cooperative Banks that employ approx. 12,000 people. Its main purpose is to support Cooperative Banks and run a syndicated banking activity.

The Bank was faced with circumstances that encourages the management to use the innovative **AddValue™** method **to measure the profitability of all the tasks within the organisation.** The evaluation was carried out in 2014. The evaluation report, which contained highly expressive and clear results, was used by the Bank to measure the value of its positions and to make restructuring decisions. In 2015, the bank faced the challenge of developing and **implementing a new strategy.** It required major structural changes and further process optimization. The implementation of the new structure was preceded by another profitability study conducted by a modernized methodology called ValueView®. The evaluation was conducted for all the bank positions except for its branches. **In total, the profitability of nearly 1,500 tasks and processes was assessed.**

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Periodicity of the ValueView® evaluation
10% efficiency increase in 2016

In 2016, the Bank carried out another ValueView® evaluation. The objectives included: recovering the time spend on minor/necessary tasks, freeing up certain resources to focus on the Bank's priorities, and improving work profitability and efficiency. The results of the evaluation were communicated to the Bank's personnel so that they could use, together with their managers, them to optimise their positions and the tasks they performed.

TASKS / POSITIONS

The objectives of the ValueView® evaluation in 2016:

- To recover 10% of the time spent on tasks of little significance.

- This percentage will be equivalent to over € 700,000 annually.

- To free up about 60 jobs and to use the resources to pursue the Bank's strategic goals.

- To ensure that personnel perform tasks that are significant and necessary

The third ValueView® evaluation included 140 positions, which included **1,405 tasks.** A total of 126 highly profitable tasks, 172 unprofitable tasks (i.e. approx. € 0.35m) and 67 highly unprofitable ones (i.e. approx. € 0.16m) were identified. A total of 298 tasks had to be revised in terms of significance and relevance within the organisation.

"Over the years of our operation, we had developed a number of processes that we were unable to verify in term of relevance. (...) ValueView® is a simple and straightforward way of identifying what improvements we should make and what we should focus on"

Ryszard Lorek, President of SGB Bank SA

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How SGB Bank SA benefited from implementing ValueView®

The implemented strategy and profound restructuring process

ValueView® study made a contribution towards an efficient implementation of the bank's profound restructuring process. Changes in personnel policy and organizational changes were implemented based on reliable data. The Bank achieved its economic targets and improved the quality of its services.

Immediate return-on-investment (ROI)

Thanks to the regular ValueView® study, the Bank can easily select unprofitable tasks, which are then eliminated by the organization, and highly profitable tasks, which require more effort. Thanks to the study, the Bank improves its effectiveness with no added costs. All it takes is to allocate its resources better.

Accurate and measurable data

Thanks to ValueView®, the Bank's employees receive accurate information about which tasks and goals that they perform are profitable and what makes their work meaningful, thus being a source of motivation and security. With this information they can actively participate in the optimization of management processes.

Self-calibration of the organisation

Employees, in consultation with their superiors, can make changes in the work processes for the benefit of the Bank and its customers. Periodic ValueView® evaluations allow for self-calibration, meaning that the organisation's processes are gradually modified to reflect its needs and goals.

Prioritising the tasks of each employee

ValueView® allows for a proper prioritization of tasks and processes and their intelligent reconstruction without the risk of losing effectiveness or making mistakes in the allocation of resources which are common in restructuring processes. Therefore, the Bank reduced the risk of negative social consequences and wrong restructuring decisions.

Up-to-date job descriptions

ValueView® provides the Bank with precise and up-to-date job descriptions. Also, the beneficiaries of the tasks performed in each positions are identified.

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