

Solutions and Expertise in Retirement Services



At BD Consulting Group, we know and understand the environmental pressures and challenges in the **retirement industry**. Our professional consultants bring more than **20 years of hands-on Retirement industry experience** coupled with strategy and implementation expertise. We've worked in and across organizations like yours. As business professionals, we've led service and operations functions, marketing and distribution teams, regulatory and compliance organizations, call centers, training and organizational readiness teams. We have an **end-to-end view of Retirement Services** organizations – the complexities and the nuances – and understand how the pieces need to fit together to achieve your business success while improving the customer experience.

Retirement Services Operations

Many organization have been doing the same things for a long time, but are no longer seeing the same results. The pressures of the Retirement Services marketplace require a different response.

- Increasing need to transform and possibly outsource delivery models
- Shrinking margins and cost challenges balances with changing customer demands
- Ongoing regulation changes and required compliance yet to be defined
- Continuing industry consolidation through mergers and acquisitions

BDCG Retirement Industry Experience

These challenges cut across the financial services industry and the BD Consulting team has been advising some of the largest retirement and financial services providers on how to:

- Identify and execute business and operational transformation coupled with cost reduction approaches
- Develop and implement risk control frameworks to address business and regulatory challenges
- Execute business integration programs to quickly and efficiently implement integration strategies
- Assimilate and incorporate these changes into business operations – creating cultural change
- Design and implement new service delivery models
- Reengineer all aspects of retirement service operations
- Implement performance metrics for all organizational levels and functions
- Install retirement services industry software products
- Build Organizational readiness and governance for complex transformational programs
- Leverage formal Change Management methodologies supporting organizational adoption

BDCG brings objectivity to help guide your organization through the changes that can derail many initiatives.

With targeted skill-sets and tools to enable you to respond to the changing environment, BD Consulting is able to offer **cost effective, flexible, practical** approaches and solutions ranging from **strategy to experienced, feet-on-the-ground implementation**.

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