Potential2Achieve

inspiring performance, enabling success

A case study – Focus on the people and provide common purpose to improve processes

Most organisations have some form of annual appraisal process which is linked to a reward review. Rarely does this process remain static as the market place demands that bonuses are linked to business performance and shareholder return. For an organisation of 35,000 employees there was just six weeks to conduct a post implementation review of the previous annual round and to prepare for the upcoming year of processing bonus payments and amending base salary data for the entire population. An independent review by a consultant is a worthwhile investment in these circumstances in order to identify strengths and weaknesses in the process and make recommendations for future activity.

In the organisation referred to, the consultant identified the following critical weaknesses:
- Process completed 3 weeks behind schedule.
- PIR from previous year was not followed through.
- Base data was of poor quality, resulting in rework.
- Over 10,000 service failures/processing errors.
- 3,600 amendments necessary after deadline for completion, requiring manual rework.
- There were two key elements of the process where there was a reliance on just one individual with the required expertise.
- No procedures documented.

Due to the amount of time and resource which had to be allocated to rework, the timescale to implement change and prepare for the next round was reduced by half. This required a fundamental change of focus of the team who were feeling both physically exhausted and psychologically distressed. Therefore, the first critical step was for the consultant and leader to direct the team to take a step back away from the process and reassess the activity from the customer viewpoint.

Over a series of workshops and coaching conversations with key players, this changed viewpoint resulted in the team creating a project plan with the customer at its heart and the activities prioritised accordingly. This plan involved the team working alongside stakeholders, customers and end users to cleanse base data, simplify IT systems and create new procedures to streamline the myriad of different schemes which were making the process overly complex. By working more closely with customers during the change process the team immediately started to receive compliments and praise. More importantly the customers were more understanding regarding errors and showed greater empathy and supportive behaviour to the processing team. In addition, the staff were trained and coached to develop strong project management disciplines. Back office and customer processes were redesigned to enable an effective and streamlined operation.

The outcomes achieved were:
- PIR actions all followed through and changes implemented.
- Responsibilities agreed and documented between all parties, including the customer.
- Next round delivered on time.
- Multi-skilled competent team.
- Service failures reduced to 1,000.
- Customer feedback positive with numerous departments writing to praise the central team.

The key output was summed up by the department head "the change that made the difference this year was the fact that the team put the customer first and by focusing on their needs made the right changes to the right processes to get the right result".