

Managing Complex Environments

How to deliver faster at lower cost

**A special report for executives who want
improved performance in casework systems**

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How to Deliver a Faster Response to Customers at a Lower Cost in Complex Environments

How Consumers Are Changing and How It Affects Your Business

When our youngest son Matthew was 4 he wanted a Wayne Rooney football card. He was sitting in the lounge cross legged in front of the TV when an advertisement for Amazon aired extolling the virtues of their fast delivery. He turned to his mum and said *“Can we go on Amazon and get that football card?”* she agreed and sitting at the dining room table they ordered the card. Matthew watched the process with awe and then once the order had been confirmed he jumped off his mum’s knee and rushed to the letterbox. We found him with one hand in the box peering through to the outside. *“What are you doing?”* I asked, *“Waiting on my card”* he replied, *“The man on the TV said I’d get it instantly”*.

We live in an age with expectations of instant gratification. You no longer need to go to a bookshop to get a book or a record store for music, just order it online and you have it 30 seconds later. The market values speed, and it’s also one of the keys to customer loyalty.

Loyalty is important because, according to research commissioned by Xerox, loyal customers buy more (up to six times more) and cost less, because they complain less. But whilst service speed is one part of the loyalty equation there are another two parts you should be aware of. The first is of course value creation (this is the end result of product and whether it delivers against customer preferences). And, according to the customer research council in New York, the other key to creating loyalty is through creating ‘low customer effort’, meaning making it easy for the customer, easy to buy, easy to use, easy to... do whatever they want really.

Identifying Casework Organisations

Some services are fairly easy to design so that the customer gets what they want. Booking a theatre ticket, arranging a holiday, even getting medical advice online is now routinely handled in one stop transactions.

But not all services are easy to change, especially if it’s more speed that’s required.

One of the most complex types of service to change, and understand, is what I’ve named the Casework Environment.

This type of environment has the following characteristics:

- There are typically multiple people involved in the delivery of the end product
- The customer usually bears a heavy burden in terms of information provision
- There are usually third parties such as other agencies or sub-contractors involved in the service delivery

And there are three big patterns to look out for:

1. Typically multiple interactions are required from the front line member of staff to get the job done.
 - In systems like health insurance claims for example we've watched the claims assessor or administrator have to repeatedly interact with a GP or consultant and the customer over a number of weeks in order to get the information required to settle a claim.
 - In housing voids the housing administrator will be working with multiple clients to find the right match for the property and liaising with a contractor and housing manager to ensure that all the works required to bring the property up to scratch are completed.
2. This is not a process that can usually be completed quickly, at least by traditional means.
 - Working with local authority planning departments for example we found that despite obvious differences in rural and urban planning departments, the real time taken to make a decision on a planning request was still around the same average of 60 days.
3. Normally some sort of workflow system is used to push work at front line staff to maintain maximum productivity levels.

Thus this system typically makes life challenging for customers, difficult for front line staff and has a typically slow delivery with high costs.

I've been interested in these systems for some time and I've analysed them in around 40 in different businesses. They can be difficult to study and challenging to fix but the results are worth it. If you manage one of these systems and you have an interest in making a change for the better the key is first to understand the assumptions around which they are built, then with the application of different thinking you can transform life for your customers, your staff and even yourself!

You may not have thought of yourself as working in or managing a casework organisation, most haven't, but if you do and you recognise the characteristics it will give you a starting point for fast change. Think of it like having acquired a new and exotic pet that got ill. If you took it to the vet the first thing they would do would be to identify what category of animal it belonged to before starting out on a specific diagnosis. That's what we're doing here, starting out with a category or sector with common DNA (and common ailments). Below I've provided some examples of environments where casework solutions will apply:

- Housing allocations and voids
- Insurance claims
- Mortgage fulfilment
- Legal work
- Public sector planning
- Social work systems
- Public sector environmental health
- Installation programmes
- Estate settlement
- Pension claims

Whilst I'm sure there are more, these are the ones with which I've had personal experience. And don't let low volume lull you into a false sense of security, in some cases, like housing voids, there may only be a few hundred live cases being worked at any time. I've seen other examples where large workflow systems were being used to manage up to 12,000 cases at a time (more on this later). They're still casework systems.

What Goes Wrong

Take this example of where the traditional issues of casework systems can lead - poor service and huge delays in a local authority service delivering home adaptations for the elderly or disabled. As you can see from the graph below (the height of the line represents the time taken to complete) the unfortunate customers of this system would regularly have to wait around 2-3 years to get their adaptation.

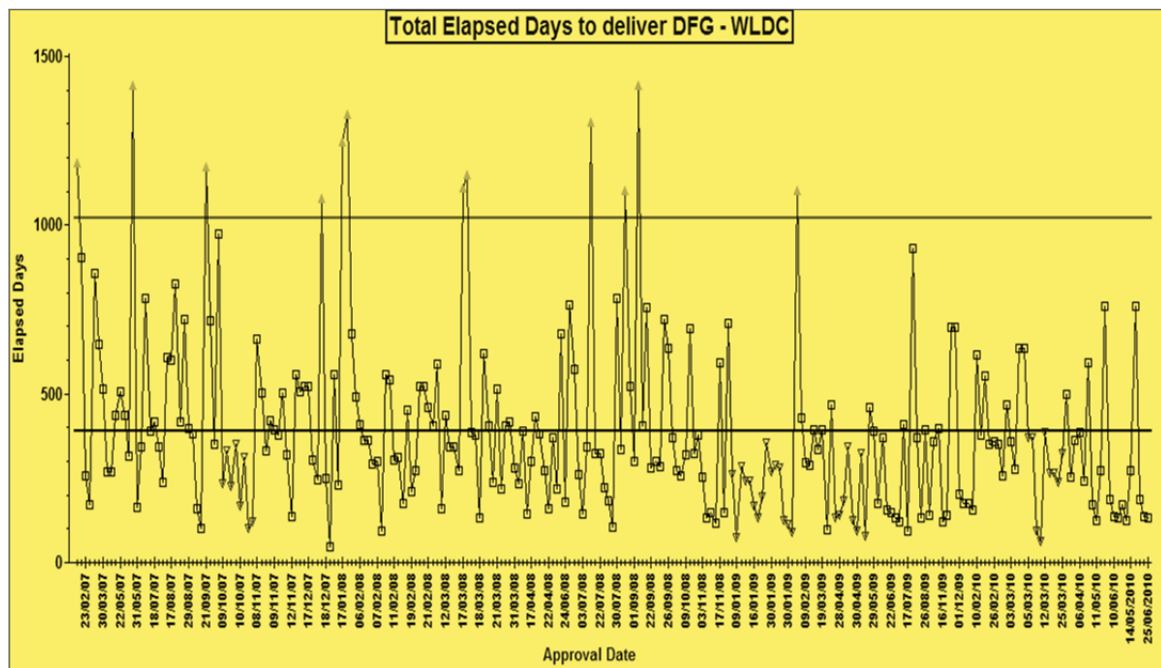


Figure 1: Time Taken Per Case to Deliver Home Adaptations

This was despite the council putting in more staff and getting additional agencies (at more cost) involved in the process. Such responses to these issues are common but are the organisational equivalent of repainting your car and adding a spoiler, it may make it look better but under the hood the engine still works as badly. By challenging some of the assumptions that govern this system and using some of the methods I'm briefly describing in this paper, we helped them develop a system that delivered adaptations for customers in an average of 49 days from request to completion.

It is hard to look at the familiar with fresh eyes, so let's try and get the clarity of an outside perspective.

Multitasking

In a typical day James, who manages claims for an insurance provider, will start work at around 8.30am. His tasks for the day will have been decided for him, he'll get a batch of work of around 30-40 tasks, but he'll have access to a number of different work queues. When it's busy he may have access to thousands of tasks.

Depending on the size of the work in progress i.e. the number of items in the queues, his work priorities may shift. He may be instructed at certain times to work the easy cases in order to tackle volume and at other times he may be shifted on to the more difficult cases simply because they'll

now have been lying there for a long time. (This is also how it works in most of the housing voids and planning systems I've studied over the years.)

And there are other factors which will shift the work priorities. If there is a target time applied then those that are still within target may be put to the front of the queue. Those that have missed the target or service level agreement can be left aside indefinitely. Then, just to turn the heat up a little more, James might have to stop what he's doing because of a complaint that has come through a senior executive or from a 'shout the loudest' client.

Think of it like this; imagine you have giant to-do list on your desk. Let's say it has over 100 items on it. Is it not possible that you, as a human being, might be tempted to pick out the easy ones in order to make it look like you'd make great progress that morning? And then imagine that as you're working through those your boss keeps popping their head through the door to ask you to '*stop doing that and start doing this*'. So those cases are left halfway and others started. Can you see how by the end of the day you might have started lots of bits of work, but managed very little in the way of getting cases closed? This is one of the reasons why giant workflow systems often have thousands of tasks in work in progress and suspension queues, and as a result nothing gets closed. What's happening is multitasking – on a giant scale.

The popular press run articles telling us women are better are multitasking than men. My wife has a different view, she claims it's not that she's better at doing more things at once she's just better at doing more things than me – full stop!

Whilst she's probably right on the latter point I'm afraid the press are wrong on the former. And though I'm making light of the subject there's a very serious negative side to multitasking. The research, which started as far back as the 1960's, claims three main problems:

- The first is that rather than speeding up throughput, multitasking actually slows down the speed at which clients are served
- It provides the illusion of productivity but in all cases we've studied actually achieves less
- Front line worker stress goes through the roof

The second cause of the problems in the casework work system is related to process design, in the way that the process is broken up between front line staff. The problem is functional design.

Functional Design Makes Life Worse for the Customer and the Worker

If multitasking isn't bad enough there's a second problem for the front line staff member to handle, and to describe it properly we need a bit of a history lesson. In the early 1910's Henry Ford had a problem, a problem that many of us only dream of having, he had more demand than he could cope with. So he brought in management consultant F.W. Taylor, and then a few years later Alfred Sloan, to help him to increase productivity. Their answer was simple 'the worker was not to think', therefore work was broken down into little packages (fit the seat, paint the roof etc.), and the same worker would do that work day in and day out until he or she became ultra-fast at doing the same thing every day.

This is fine if certain conditions can be met. The first is that the work will be equally distributed among the workforce so no-one ever runs out of work. The second is that the worker will never get bored of doing the same job over and over again. In fact most workers couldn't stand it and staff

turnover was astronomical. Ford hired and then lost some 52,000 workers a year in order to have a stable workforce of 14,000. He was eventually obliged to solve the problem by offering the highest labour wages in the US at the time (\$5.00 per day) and reducing the working hours. More importantly the world has changed, customers want more variety and greater choice, staff want better working conditions and a more purposeful existence. But...

Skip forward 100 years and you'll see that some managers are still stuck in this mindset. Some managers of housing voids systems, public sector planning systems and claims systems still allocate their work by type of skill/knowledge (the same happens in most call centres). And in a perfect world where there is stable demand split across all work types and no work ever ends up in the wrong queues I'm sure it all works well. In real life however some front line staff sit idle as others are swamped and yet others spend much of their day reallocating cases to differing queues rather than actually doing work on them.

And, where front line staff are rewarded for the amount of 'pieces of work' they do, it's even worse. As one assessor told me *"sometimes I find it helpful to get the wrong items in my queue, I get rewarded simply for moving work around!"*

In some systems the problem is further exacerbated not only by the cases being split by skill but the tasks within cases being split by skill. If you're the front line worker you'll only be doing pieces of cases and never actually seeing the end result, that bit will be done by someone else.

So going back to James, our fictional worker, his day is now spent doing the same type of work all day long, with constantly shifting priorities and maybe dreaming about the types of more interesting work he'd like to do. But alas when more interesting work does end up in his queue by mistake he simply has to pass it on to someone 'with more experience in that area'. Further, in some cases he may be allowed to do part of the complex case but have to pass it on to someone else when the next task goes beyond his training. And when he asks about learning to do the more interesting work guess what he's told, that's right 'we're too busy'.

Making improvements to this type of work sounds pretty complicated right? It can be, but the complexities are not over yet.

Service Level Agreements That Do the Exact Opposite of What They Promise

Let's return back to our to-do list, here's what it looks like now:

- There's over 100 items on the list
- You want to get to the easy ones so that you look busy/successful compared to peers
- Your boss keeps asking you to stop what you're doing midway through and start on something else
- Now you've been told that you have to pass the interesting cases on to someone else... you're fed up right?

It's about to get worse. Now the boss has looked at the team's work in progress only to see that it's growing and more and more customers are complaining, and rather than changing some of the silly rules you're working to they add another layer of complexity to the mix, the SERVICE LEVEL AGREEMENT. Imagine each task now has a time allotted to it, some you know you can hit and others you know are outside of your control. Do you do the one that's been there the longest (and is never going to make the SLA time) and so do the right thing for the waiting customer? Unlikely,

you'll reach for the ones you know you can still get done within the target time you've been set – you're human after all.

The SLA is quite a logical concept. Take a piece of work - decide how long it should take to do and then set a target to do it in that time. Even better, only measure the bits of the process that you have control over.

So if you were a health insurance claims manager you might set an SLA for the assessment piece but stop the clock when waiting for the GP to respond, if you were a planning manager you might only start the clock when you had a fully complete application (ignoring the 2 times it had to go back for omissions first) and if you were in housing voids you might have targets for the time it takes to get a property offer out or for the keys coming back from the contractor.

However SLAs work under a set of rational assumptions, few of which are true:

- The first is that the standard is within the control of the worker. It's often not. What if you have 8 days to assess a housing claim but there's already a 10 day backlog? What if you have 10 days to refurbish a home but it requires a new kitchen and that's going to take 12 days?
- And if the SLA is generous and easy to hit the worker will slow down. Why work to do everything in less than the time allocated? It'll only get your target increased next month. This is called Parkinson's Law. The problem is that then when a spike in demand hits your capacity is eroded, service fails and costs rise.
- Another problem is Student Syndrome, as one canny repairman told me, *"Why do the work today, even though I could, when I can leave it till it's due on Friday?"*
- And the final one is that, being human and wanting to: save face/avoid shouting/preserve our jobs/get that bonus/not let the side down, we may cheat to hit the target.

An old friend often laments on his work in a call centre when one day a new worker was given a bag of crisps from his colleagues as a starting gift. He was told to *"eat the crisps but keep the bag and when the queues start to build and hitting your time targets becomes impossible - reach for the crisp packet and crinkle it in your headset, claiming a bad line before cutting the customer off to maintain your SLAs"*. And for the record I'm not saying that you have bad people in your system, rather a system that is creating bad people.

Can you now see that as you return to your to do list, multitasking is rife driven by multiple priorities, queues are being flooded and then starved of work and you're being measured on the number of tasks you do rather than the number of cases closed for customers.

In his book 'Punished by Rewards'¹ Occupational psychologist Alfie Kohn cites another problem. Targets that do the exact opposite of what they're trying to achieve. Rather than motivating the worker to more, psychological motivation is reduced as front line staff focus on hitting the number rather than serving the customer.

Often in these systems managers forget what they're trying to achieve. In his seminal book 'The Goal'² the late Eli Goldratt famously captured this concept. I once had the privilege of attending one

¹ Punished by Rewards, by Alfie Kohn, Mariner Books, 2nd edition, 2009

² The Goal, by Eliyahu M. Goldratt, The North River Press Publishing Corp. MA, Fourth Revised edition, 2014

of his day long seminars and he explained it like this, “*an organisation has to remember what they are trying to achieve for the customer... What’s the goal?*” In casework or workflow systems the goal is to give a client a decision. And “*How do you measure the goal?*” he asked, “*simple, in goal units*” i.e. it matters not a jot how many bits of tasks you’ve done on your to do list, or how many bits of a the voids process you’ve completed, or how many times you’ve chased the doctor or opened and re-suspended the case. What matters is if you’ve given the client a decision – that’s the goal.

Let’s revisit those (in some cases century old) assumptions you’ll have to address if you want to reduce multitasking and improve capacity in your workflow system:

Wrong assumption number 1:

The more cases a worker has open and can work on the more productive they’ll be.

Wrong, because the more they have open the more opportunity they’ll have for working on lots of sub-tasks in their massive to do list rather than working a few cases right through to completion.

Wrong assumption number 2:

It’s normal and right to have constantly shifting priorities, that’s the way the world works.

Wrong, because most of those shifting priorities are self-imposed and drive the very behaviour you don’t want, more multitasking.

Wrong assumption number 3:

Work should be split by skill/knowledge type.

Wrong, because this erodes capacity and causes front line staff to be more interested in whether they are working on the right type of work than whether they are doing good work for the customer.

Wrong assumption number 4:

The use of unit times will encourage workers to work faster.

Wrong, it encourages the front line to slow down to fill all of the allocated time per task or to cheat to hit the numbers and further it warps their sense of purpose, which has now become hit the numbers rather than do the right thing for the customer.

All of these cause slower resolution for the customer, the illusion that front line staff are working faster when in actual fact they’re achieving less, and further focusing on one work type and manipulating the numbers to hit the SLA causes very high levels of stress.

All of these will ultimately negatively affect your capacity and costs.

A friend of mine, Lee, calls this type of problem a reinforcing loop. He describes it like this:

“The work is divided according to skills; this causes backlogs in some areas. As these backlogs grow managers split the work between easy and hard, as a result the complex cases grow as do the backlogs. SLAs are put in place to ‘speed things up’ which causes workers to either slow down or cheat to manipulate the SLAs. Now the numbers look fine but the backlogs still grow. As more and more customers complain increased numbers of priorities are put in place to ‘improve customer service’, multitasking becomes rife, everything takes longer and stress increases. Stressed miserable staff get sick, reducing capacity and it continues to get worse.”

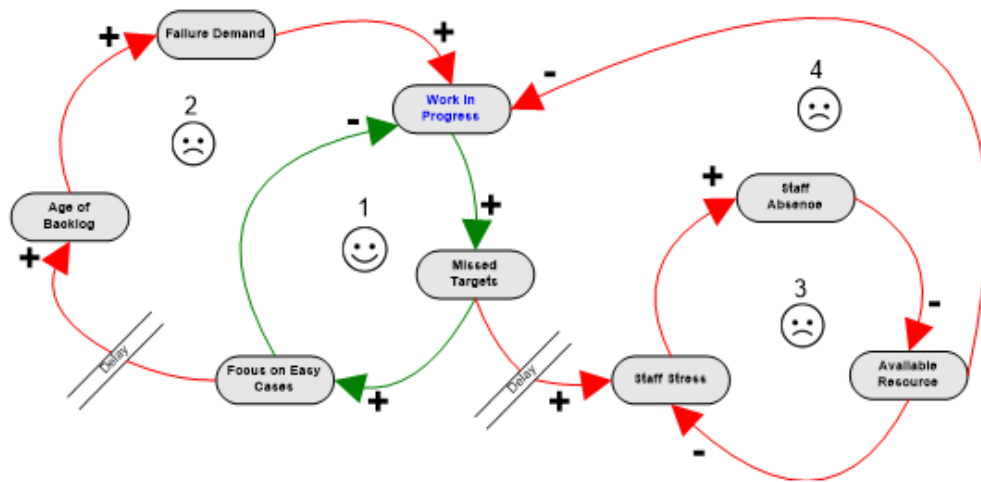


Figure 2: Reinforcing Loop



Figure 3: The SLA's all look fine but the work is hidden in queues

As Lee states, ‘there is no resolution until the core assumptions are challenged and changed.’

What to Do Differently:

Challenge Old Assumptions

As Lee states so eloquently, to change performance you have to change the management assumptions that are the root of the problem. So let's examine those assumptions:

1. *Productivity is king, the more work we push at the worker they more they'll do.*

Actually it just drives multitasking. Remember the goal; closing the case is more important than the number of tasks you complete in a day.

2. *Functional design. If the worker's tasks are divided by skill/knowledge they'll get more done in a day.*

Morale and productivity will drop as front line staff spend more and more time replacing cases into the correct queues, and they'll rarely get the satisfaction of seeing the end result of their work for the client. On some days they'll be swamped on others they'll be looking for work to do as others toil.

3. *Targets improve morale and productivity.*

They don't. What they do is cause front line staff to either slow down or cheat and get very demotivated to help the customer.

So what to do instead? First change the core assumptions:

New Assumptions:

1. **Look at the world from the customers' point of view. Remember the goal is not to be a busy fool but to complete and close cases.**

Thus the job here is to start with a clearly stated purpose. For example if you were to state the current 'defacto purpose' of these case workers it would be something like this:

"Do as many tasks as you can within a day (little does it matter if you actually close a case the job is to look busy). Also prioritise those cases that are within SLA i.e. that still count for the purpose of hitting our numbers and ignore those that have missed the target. Where possible do the easy ones, leave the difficult ones for now, they'll simply make our numbers look bad. At some point we'll get back to those hard to do cases but not today. Work to multiple priorities, regularly stop what you're doing midway and start a different case, then repeat. The main thing to remember is to forget the customer, be busy!"

This may seem harsh, but I've seen the same behaviour time and time again in this sector, it doesn't matter whether we've been researching the reallocation and refurbishment of a public sector home, studying how planning departments handle their planning requests, how managers in environmental health manage complaints or how claims handlers have to interact with workflow systems. If the above assumptions exist then this purpose will be what drives the work and most front line staff.

So what would be a better way to build a purpose? Start by looking at the world from the customers' perspective, after all the purpose of a business is to get a customer, deliver the service they want and keep them happy right? Then simply start by asking '*what is it we are trying to do for a customer?*' If it were housing allocations and voids the answer would simply be '*Allocate them the right house*'. That's the first part of the purpose, now ask a second question, (this question is important a) for the private sector for the purpose of differentiation from your competitors and b) it will lead those of you in the public sector to keep your costs low by reducing failure demand from customers.) '*What preferences do our customers have around how the purpose is delivered?*'

For example, back to housing voids, the preferences are usually obvious:

- Right house for my needs
- Refurbished to a clean and liveable standard, no outstanding repairs
- Delivered with no hassle in a timely manner

Hence the purpose now becomes '*Find me a house, the right one for my needs, refurbished to a clean and habitable standard, with no outstanding repairs and delivered with no hassle in a timely manner*'. Can you see how focusing on these purposes would drive completely different behaviours from the managers and staff in your business? And because the second purpose is easier to deliver and the customer gets what they want, they complain less, stay longer and cost you less to fulfil.

Quite simply, if you're only doing work that relates to the purpose of the system from the perspective of the customer, there is less waste work, less waste capacity and less waste cost in the process.

2. Have case ownership end to end

The second important aspect in the casework workflow sector is to make sure that front line staff member owns the same case to the end. Why? Well first of all it gives more meaning to the work. Mihaly Csikszentmihalyi was a Czechoslovakian psychologist who for 30 years of his career was interested in answering a simple question: 'under what conditions do people in organisations have to work if they are to achieve optimal motivation?'

He found that there were four:

- That people should have a meaningful purpose to work to (we covered that under number 1)
- That they should have meaningful measures that give them feedback on their performance (we'll cover that in number 4)
- That they should have variety and be challenged in their work (we'll cover that next)
- That they should be able to influence those both up and downstream of their job

In the casework sector this means giving the caseworker ownership of the case and the ability to influence others up and down stream. For example if the caseworker was dealing with a general insurance claim, let's say from fire damage, they'd not only own the customer claim to the end but have the ability to manage contractors and communicate with finance. If you think this is rather obvious, think again, in our work with the criminal justice system, police officers were discouraged from seeking support from those downstream, and it was one of the key reasons for poor workflow.

Conversely we've seen that when front line staff are given ownership of cases the time to close a case drops dramatically. In one local authority in Scotland their housing allocations and void letting performance saw the following improvements:

- Maintenance time reduced by 10%
- Percentage of property offers reduced from 66% to 28% (fewer rejections)
- 45% reduction in the average time to allocate a property after maintenance
- 22% reduction in voids costs

However, though purposeful work and case ownership are necessary they are not sufficient on their own to complete the whole transition to better performance; two other conditions must be fulfilled.

3. Limit the release of cases so that front line staff work fewer cases faster rather than simply doing lots of tasks

Let's return to our huge to do list. We know that one of the problems that is driving multitasking is the number of tasks that we have access to, i.e. the more cases we have access to the greater the chance that we'll get half way through one and stop in order to start another, especially if there are also multiple and competing priorities. The solution here is easy but generally viewed as highly counterintuitive. Limit the number of cases that a caseworker can have access to.

Imagine your job is to find potential tenants for void properties. And every time a new property becomes available it is allocated to you. Before you know it you are trying to manage around 50 properties. Your manager is under the assumption that the more work you're given the faster you'll do it. But we already know that with competing priorities and SLAs you'll simply multitask, for example if you come up against a difficult property it's likely you'll simply put it aside for later and move on to an easier one, after all you have 50 to choose from (but later never comes as more cases are constantly shovelled on your pile and there are more easy ones amongst them). But that's not the behaviour that your manager really wants is it?

Now imagine we work it a different way, imagine that you only have 1 property to shift (the most difficult one you've ever seen), and the progress of that property is visible to you and your manager, whose job incidentally is to help you to shift the house. You have no other priorities. You cannot start work on another property. What do you do? Would you agree that you'll get really creative?

Maybe you'll look at the profile of others that have taken properties like this, maybe you'll call clients and start a referral scheme, the solutions are irrelevant, what's important is that you'll start to formulate solutions and seek help because you simply cannot start work on another property. This is the power of focus.

Psychologists tell us that our brain can only handle so much. 7 numbers for example is about the most we can retain in our short term memory, and to make life easier to remember and recognise things we chunk up what we want to remember into categories. For example if I was to ask you to remember lots of different cars and lots of types of bread, after about 7 you'd give up but you'd still be able to tell me that you were trying to remember cars and bread, the two superior categories in your memory.

The same is true for work, if you want more focus and creativity you actually have force people to work on less. This means ring-fencing some of the work and only having access to a limited number

of cases (usually about 10-15 is about right) and the remainder, well they stay in the backlog. The resultant increased focus and productivity means everything is done faster.

Remember the disabled adaptations work mentioned at the start of the report that generally took over two years to complete? By (amongst other things) limiting the release of the work like this and giving staff members end to end ownership of individual cases the time to close a case was reduced to around 49 days. A recent client who handles claims has similarly found their time to close a claim has reduced from around 85 days to around 25 days, with fewer staff required and higher customer satisfaction.

However even limiting the number of open cases is not enough if the priorities are always changing.

4. Limit the number of priorities that determine what case goes first

As previously mentioned I'm sure my wife is better at doing more than me and doing it faster but when you study how she works she's not really doing multitasking, she's doing one thing at time, doing it right and owning it end to end.

Again let's return to our to do list. If we had thirty tasks on it would you agree that it's likely some will be easy and some will be difficult? And whilst we've already limited the access to the tasks we can work on there's still an opportunity for multitasking, especially if the priorities around which task we should work on are constantly changing. Having studied this over multiple different casework organisations I've noticed that there is always a propensity to have multiple priorities. The most I've ever seen was in a planning department where they had 17 different priority rules. Limit it to a maximum of 2; which 2 you use are not as important as sticking to them. Generally I'd use first in first out, and then when planning your team's work capacity leave room for some emergency tasks.

Some organisations have even leveraged the priority rule system so that they can charge premium pricing - take for example private healthcare, a casework system where if you want to pay extra you can jump the queue.

5. Move from service level agreements and targets to measures that capture end to end performance, variation and provide visual cues as to whether performance is improving

This is the final piece of the jigsaw in order to optimise performance in this type of system. I've already explained why service standards and targets won't help you improve performance, but what to do differently? The first is to plot true end to end time (for example in voids this would be from the point the current tenant informs you they're leaving to the point the new one is in the house) in what's called a capability chart (see fig 2).

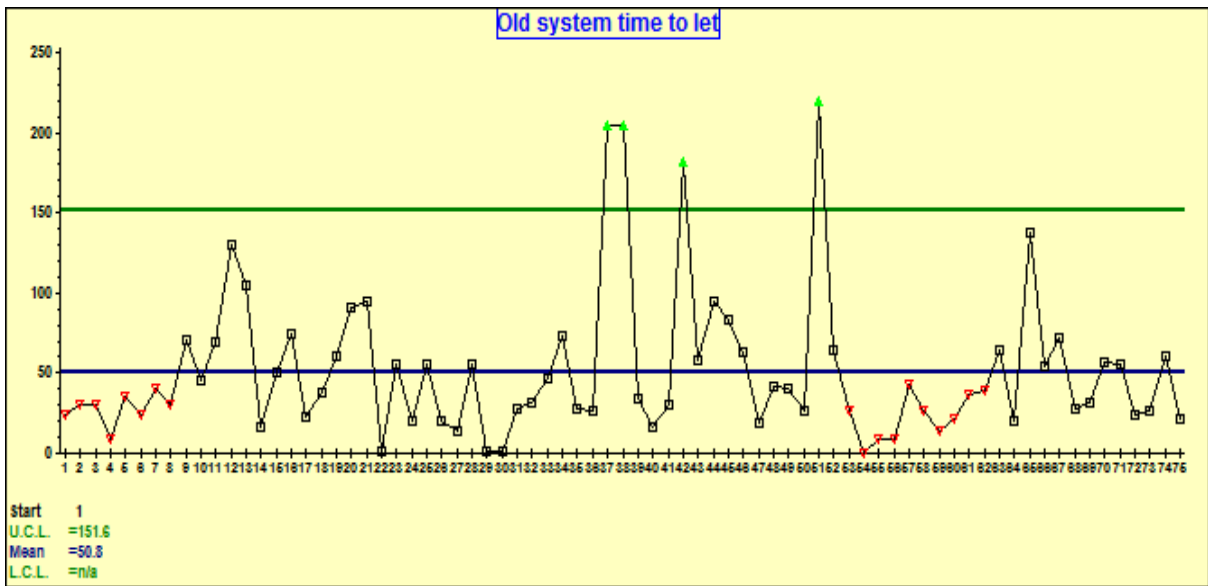


Fig 2: End to End Turnaround Time in Voids

This chart shows the end to end time for a housing association’s void properties. You’ll notice it’s different from the way that many people look at measures. The first point is that it tracks data over a period of time. That way you can see if, when you make a change to the system, your prediction as to whether it will improve things will be found true or false. Also the chart encourages you to ignore the mean. If we were to take the average time to let in this case we’d see that it was 50 days, however what we want to pay attention to is the upper limit of letting time (151 days), this is not the worst case scenario but merely an indication of the range of times that are likely. In other words it’s just as likely that the next void house could take 151 days as it is to be any number below that. Thus the job of the manager is to understand the causes of the variable letting times (see 1-4 above) change those causes and have a better performing, more predictable system.

See the second half of the graph for the same housing association below. This is after making some of the changes listed above. You’ll notice the time has dropped from an upper limit of 151 days to 72 days and the average is down from 50 to 26. The leaders still have much to do but it’s a great start.

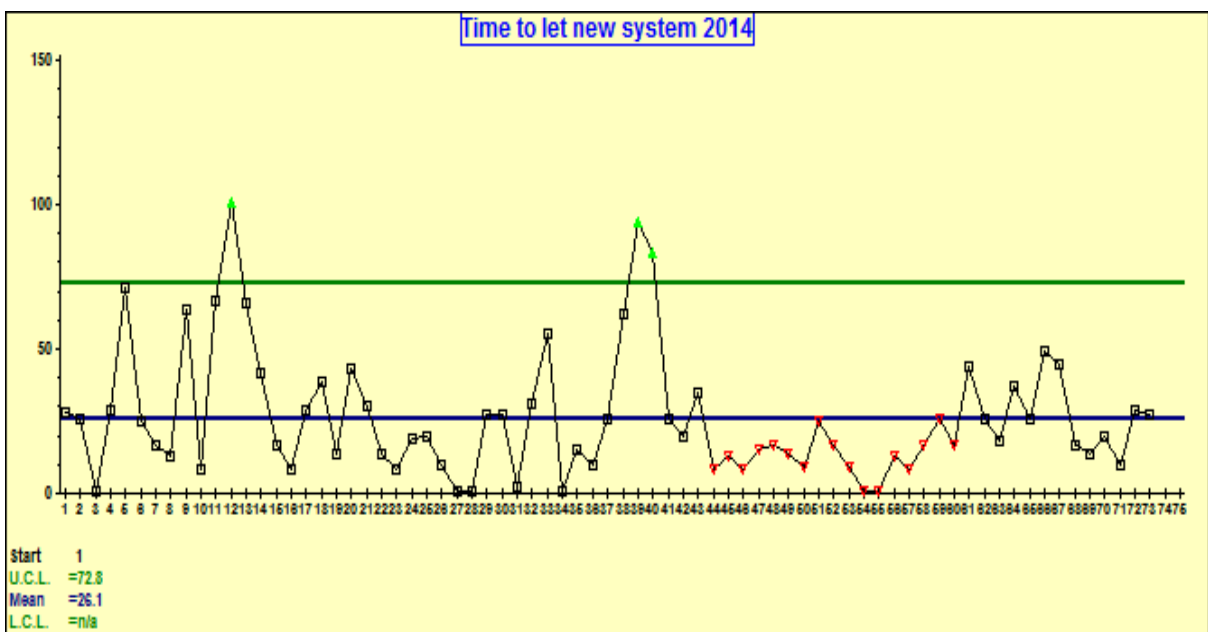


Fig 3: End to End Turnaround Time in Voids – Post Change

Unless we are willing to change our thinking, not only will we fail to get better at an individual level, our organisations will continue to fail and our competitive advantage will continue to erode. Changing thinking is a long hard journey but it really pays off.

Conclusion

If you manage or work in a casework system you have my sympathies, our research has shown that it is one of the most difficult service environments to manage and it requires specialist knowledge and foresighted managers who are willing to challenge industry assumptions if far reaching and long lasting change is to take place. However making the change is not as difficult as you'd expect and the starting point is simply adopting new thinking around the rules that you'd use to manage one of these services.

The new rules of the game are:

1. Set your purpose from the customer's point of view
2. Have your teams manage cases from true end to end
3. Limit the number of cases that they can work at any given time
4. Have a maximum of two priority rules
5. Move away from targets and service standards towards measures of capability

As the children of the instant gratification age grow up their expectations of service organisations will become more and more demanding, they'll expect the void, the claim, the case to be turned around in hours, and with a new set of rules and thinking in place you can have faster delivery, lower costs, better morale and ultimately an easier life.

More Help and Information

Vanguard (Scotland) is, via our years of studying in this sector, an expert specialist provider of performance improvement solutions for service organisations, including those that are classified as casework companies. We work with CEOs and Operations Directors to teach them how to make sense of this environment and give them intelligence about what is going on in every nook and cranny of their business. We'll show you how to gather the data needed to make tough decisions and make huge improvements.

However before we agree to work with a client we like to offer both them and us an insurance policy, this is a one day consulting assignment where we work 1:1 with the CEO or Ops Director to a) ensure that the conditions exist that will enable large change to take place and b) agree a plan that lays out exactly how we would help you reach your goals.

If you would like more information about arranging an initial discussion please email office@vanguardscotland.co.uk and we can start with a phone call.