

CASE STUDY - PROCESS IMPROVEMENT

When a leading supplier of electronic payment services wanted to enhance its business operations and customer service processes

We assisted by developing an implementation plan for a major program of business process and capability improvements.



The Challenge

Back office processes had undergone multiple internal and external reviews over time but no meaningful change had resulted. Processes were not only inefficient and costly but were also negatively impacting service quality and leading to an unwelcome level of non-compliance. We identified several key areas requiring attention, including:

Customer Onboarding;

A manual (paper based) process meant it took weeks to Onboard a new client. The process was not scalable, carried significant operational risk, was constraining growth and limiting the business's ability to respond to challenges and opportunities in the market.

Document Management;

There was no consistency in document management, leading to duplication, time wasting and a poor customer experience. The business experienced difficulties finding documents, identifying the latest version, tracking changes and publishing files securely.

Customer Service;

Processes were neither designed or managed end-to-end. There were significant efficiency losses from multiple handoffs and data rekeying across multiple systems.

What We Did

An end-to-end business process review was undertaken, including workshops with internal and external subject matter experts and key stakeholders to agree the current-state

processes, identify improvement initiatives currently under way that might deliver "quick wins" and design future-state processes.

This identified a compelling case for investment in a program of process and capability improvements to raise the efficiency and effectiveness of business operations and customer service processes in order to:

- Advance the quality and maturity of operations and customer service capabilities;
- Introduce process automation and online self-service;
- Maximise the return on prior investments in technology;
- Position the company to deliver on its strategic growth initiatives;
- Reduce the incidence of compliance breaches;
- Improve employee motivation, loyalty and skills utilisation; and
- Introduce a culture of continuous improvement.

Our Plan

Each project stream was able to be implemented independently if desired, so we recommended prioritisation on the basis of where concentrated effort would deliver the greatest value to the business (given the estimated time and cost to implement).

For maximum cost effectiveness, we drew together several distinct work streams into a single program of work and sequenced the deliverables to achieve optimal business impact whilst addressing project interdependencies.

For maximum agility and to reduce risk, we devised a project plan based upon each work stream being deployed on a phased basis, with each phase intended to deliver “quick wins” as early as possible and the balance of benefits being realised incrementally upon completion of subsequent phases. This meant that implementation could be paused on completion of individual phases based on prevailing business needs, having still delivered value for the time and effort expended to that point.

What We Delivered

We developed a series of business cases and an overarching implementation plan for an extensive program of business process and capability improvement works designed to:

- Reduce new client “time to revenue”;
- Improve pipeline visibility for all stakeholders;
- Reduce operational risk through removal of manual processing and re-keying of data;
- Increase scalability (critical to delivery on growth initiatives);
- Manage customer issues and requests faster and more efficiently = better customer service;
- Reduce operational costs by automating manual processes;
- Improve quality control by standardising with best practices;
- Improve responsiveness to information requests; and
- Capture more meaningful metrics, enabling more accurate and useful reporting to drive continual improvement.

More Information

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