

A team makes itself fit to handle the demands of significant growth.

Coxswain Alliance was engaged by a global emergency management company to lead its consulting team through an 8 week process of lifting its delivery capability; this was to get them 'match fit' to absorb growth that was driven by other parts of the business.

By Michael Larsen

Introduction

A solid and diverse business has set itself significant growth targets to ensure their ongoing success. But, they recognise that growth provides both challenges and opportunities. They are comprehensively transforming the business as they seek to grow with their clients, meeting the increasingly complex and multi-faceted demands. As part of that, they sought to make the consulting side of the business fit to take on scale and a range of other strategies.

Background

A leading global emergency management company, operating in more than 80 countries, engaged Coxswain Alliance to assist in laying the foundations to allow them to significantly grow the business. Part of this growth will be via a digital strategy that will allow significant scalability.

As part of the realisation of this strategy, the company wanted assistance in improving the performance of the

consulting operation through increased process consistency.

The Problem

Whilst the management and staff have a good understanding of their business they had *inconsistent processes, inadequate management tools, inconsistent management practices* and *reactive management behaviours* to effectively manage and drive performance. Teams are also dispersed across 4 geographies, providing support to each other, thus compounding some of the problems inhibiting their targets around consistency of process.

Analysing the Problem

Managers relied on lag indicators to measure performance meaning they were reactive and playing 'catch-up' as performance results changed.

55% of staff time was spent on Non-Value Add Activities, resulting in lost income.

One team had over 130 different templates, resulting in confusion amongst staff about what template to use and when, which subsequently impacted the client experience.

Only 82% of process steps were adhered to by staff, resulting in inconsistent client experience and reduced quality.

The Solution

An 8 week program was conducted across locations in Melbourne, Sydney, Brisbane and Perth. The program consisted of 3 phases:

- > **Process Alignment** – Process and tool alignment to drive quality deliverables for clients.
- > **Work Prioritisation** – The ability to prioritise and allocate work based on the resourcing available.
- > **Reporting** – Consistent and correct use of systems and processes to deliver accurate reporting, allowing for quality decision making.

The **3 key measures of program success** were:

- Standardised processes, templates and tools.
- Identification of additional capacity which could be used for scalable growth.
- Improved quality.

Aim: Standardise processes, templates and tools to drive high quality deliverables for clients.

A standardised process enables any organisation to build scale whilst enhancing the client experience.

The work focussed on the following efforts to lift performance:

- > **Standardised processes, templates and tools** which drive consistency and **high quality** deliverables for clients, plus the ability to on-board and upskill staff quickly.
- > **Enhanced ability to prioritise and allocate work daily, based on the resourcing available.**
- > **Structured management and a 'Fair Day's Work' for all:** The company now has a set of consistent management routines making the management team more effective at identifying, realising and managing available capacity daily.
- > A new **Post Implementation Review (PIR) Framework** will be used across all teams and looks to use both internal and external sources of data to allow for the review and evaluation of project success. The recommendations coming from a PIR will be classified into opportunities around *People, Client, Process* and *Financial* and will be used to improve existing processes and future projects.
- > A **Quality Management Framework** to enhance the client experience through:
 - Introducing Quality Assurance to enhance the company's focus on delivering quality deliverables to their clients as well as providing coaching, training and development internally to consultants.
 - Empowering consultants to manage the end-to-end process and be accountable for final client output.

- **Electronic feedback** from clients post-deliverables and annually. This provides information on how well the account is being managed, that the quality and service are meeting expectations, NPS data and opportunities for improvement.

- > Implementation of an **Opportunity Log** and associated management process has set the business up to capture, prioritise and action *people, process, system, financial* and *product* improvement opportunities.

The Result

Capacity	Productivity
<p>Identified greater than 40% in available surplus capacity across all areas.</p> <p>This surplus capacity can be used to deliver the company's objectives to increase scalability and revenue.</p> <p><i>This answered the question: Do we have additional capacity to do more work within our existing resource base?</i> YES</p>	<p>Productivity uplift of 30% was achieved from a pre-program baseline of 44–46% to a result of 74–76% at the end of the 8th week.</p> <p><i>This answered the question: While we have additional capacity available, do we have the capability to realise it?</i> YES</p>

"The work allocation tool helps in ensuring a consistent work effort across the board and allows for available capacity to be visible and utilised daily."

Team Manager



How the results were achieved

By the end of the project, managers were empowered with tools, practices and behaviours linked to the levers that drive performance.

Consultant Behaviour: Managing the consultants was critical to success in the three areas of *Client Experience, Financial Performance* and *Productivity*.

Previous 1:1 performance meetings were ineffective and reactive. New management practices led to more 'real-time' setting of expectations; regular feedback; and identification and delivery of training and coaching to address gaps.

Measuring Performance: Current reporting was ineffective; whilst all

the key data was available it was used as lag indicators and corrective actions were not taken soon enough to impact performance.

- > Daily, weekly, monthly performance reporting linked to the lead indicators was introduced.
- > Reporting and evaluating intra-day Activity Attainment and Productivity metrics.

Management Practices and Behaviours:

Previously, managers were reactive, assumed their staff were doing the right thing and assumed their staff “would come to me if they had a problem”. Managers needed to become more engaged in the intra-day performance of their teams.

- > Setting daily expectations – a daily plan was set and communicated at morning Kanban huddles.
- > Kanban visual management boards introduced to report intra-day performance to the team.
- > Once a day ‘Walk the Floors’ to check-in and review lead indicator performance versus plan at a consultant level. Timely corrective action taken to address variances.

Productivity: Actions required to improve productivity:

- > Continue to focus on managing activities to client Service Level Agreements to improve productivity and attainment – regular discussion at daily huddle, side by side coaching and follow up during the ‘Walk the Floor’.
- > Increase depth of understanding of performance metrics and drivers – the levers that drive performance and understanding trends.
- > Continue to seek client feedback at every opportunity to improve processes and service.



Feedback



“The work allocation tool helps in ensuring a consistent work effort across the board and allows for available capacity to be visible and utilised daily. The program has been rewarding and challenging. It highlighted lots of improvements that can be made within the team, some of which were confirmations of previous thoughts, and others that came as a surprise.”

Team Manager

“For the (I believe) first time, we will actually hear what our clients think of our products and services now that we have the Client Feedback Forms and the PIR Framework. This insight will serve the purpose around improving the client experience, and empower consultants with the feedback they need to stay motivated and identify areas for Personal Development.”

Team Manager

“New templates have streamlined how we complete activities, making it easier to complete more work in a shorter time frame. Making us more scalable. They will also make our work more consistent across areas.”

Consultant

“Apart from the strategies and techniques learned on how to implement and manage the change, which I can take back and use anywhere I go in my working life, I very much learned the value of ‘being busy’. It is one thing to say you’re busy but the amount of work you actually have on could very much be a result of broken and inconsistent business systems and processes. The Kanban is such a valuable tool for organisations to create that visibility across the teams to identify how much we all really have going on and achieve a fair day’s work – i.e. do teams need more resources/do we need better templates/do we need defined/reviewed procedures for carrying out tasks etc. etc. I’m looking forward to seeing the positive affects the new MOS will have on the business.”

Consultant



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