User-centred, Agile Service Transformation

Client

Federal Government Agency

The Agency works to improve the lives of all Australians.

Timeframe

July to December 2016

Value

$1.35m

Responsibility

Whole delivery: user experience lifecycle, system design, implementation and transition to business as usual.

Areas of expertise

- business model and service design
- testing, validation and evaluation
- coaching, development and training
- data-driven insights

Scale

- 110 workplaces
- 2,500 workers nationally
- 300 unassessed incidents
- 5,000 open service requests
- 80+ service entry points

Outcomes

Significant increase in operational maturity and risk management culture.

Enabled "front-of-house" facility; all cases subject to risk-based triage and prioritisation.

Reduced 5,000 service requests to 500 (volume reduced by a factor of ten).

Saved over 2 person years of operational time.

Data requirements defined, data captured at first contact, ensuring evidence-based decisions and records, enabling data-driven insights.

Single assessment point and service criteria applied from first contact, ensuring service timeframes and performance indicators met.

First evidence-based case management protocol; enabled rigorous allocation and workload re-balancing in real time.

Automated management performance reporting; collating multiple data points and providing strategic visibility previously undemonstrated.

Project Description

The agency inherited a 6-fold increase in case workload, and they didn't have process architecture or an ICT-based case management system. They urgently needed to understand their users' journey 'as is' and desired and an electronic system to enable a different way of operating.

The existing paper-based approach was not scalable and had no meaningful data capture. Work was not risk assessed or prioritised; work was reactive and ad-hoc. The existing method relied on key individuals, multiple touchpoints, and reacting to the cases with the most 'noise'. The client was unable to respond to the increased caseload, they couldn't assess case complexity and service delivery was adversely impacted.

Approach

1. Consolidate all the entry points into one, introducing a single "front-of-house" for new cases.
2. Rapidly build a minimum viable product (MVP) to allow the team to triage, assess risk, complexity and categorisation of cases (to inform allocation and load re-balancing).

We used agile principles and time-boxed deliveries of the new case management system. The system was made up of multiple components, developed, delivered and user-accepted in highest-value order. The team was multi-disciplinary, with case managers and technical staff interacting daily.

> **This was our the first ever IT case management system and our users loved it – it literally saved us two years of working time!**

We introduced a central entry point and a management matrix. These were implemented allowing specific assessment and rating of risk for each case (service request). With a single system used to record all new service requests, we captured three months of transactional data (core business, reactive work).

During the project, we educated the case managers (the core users) on user-centred design. We built capability for them to understand and model their clients' journeys, enabling them to own the full client experience (closure and feedback).

The team learnt service design and actively co-designed their new service delivery model. Evidence from web analytics, corporate systems and the system allowed:

- transactional volume to be measured/predicted
- a mapping of transaction volume against case types, discretionary and nondiscretionary services
- potential reductions (what to automate, cease, postpone, outsource)
- identification of high-volume manual tasks to be converted to online forms and FAQs (introduced self-service).

With the case management system in place, we obtained quantitative data. This allowed the team to determine estimates of time to resolve cases. We modelled annual "work-hours" and developed the first endorsed business case for required resources (people, processes, technology).