

# 30% improvement in productivity was achieved by introducing a case management approach

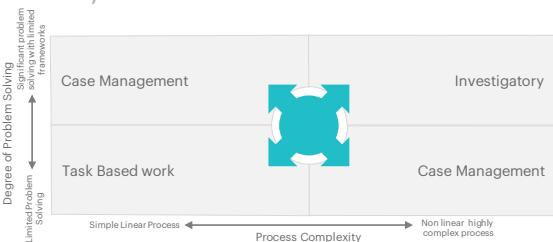
A recent initiative completed by IQuium achieved significant improvement in unit cost of processing and customer experience by changing the way work is managed within a large mortgage processing team.

## The Problem

A mortgage processing team of a large bank had failed to achieve economies of scale as the business had grown, resulting in increased cost of processing whilst their customer experience deteriorated. Analysis of the work the task based work approach was not optimising performance of the team and significant inefficiencies existed.

## Task vs Case Management

The way that work is processed is a factor of the complexity of the work, linearity of the process and the predictability of the outcome. Where work is of low complexity with minimal problem solving, a linear process with a limited range of known outcomes a task based approach to the work is the most efficient way of managing work with staff who process the work completing each item received on a task by task basis.



However, as work either moves away from a linear process and/or involves greater problem solving, a case management approach is a more efficient way of managing work with multiskilled staff case managing depending on the standardisation of the

outcome. For more complex processes and with a high degree of problem solving a more investigatory case management approach is appropriate.

Case management is a collection of tasks or steps required to complete a process which is ideally owned and managed by one individual from start to completion. In a case managed approach, tasks may be completed by “experts” in addition to the case manager, however, the case manager would still have accountability for the overall task completion.

## Solution

The initiative reviewed the type of work that was being completed and identified that a case management approach would be more applicable based on the problem solving and complexity of the process and deployed the change across the team.

## Results

The transition from task to case management resulted in almost 30% reduction in touch time to complete the task and significantly improved the customer experience which had positive flow on benefits to new business for the organisation.

## Change Management

Shifting the workforce from task to case management is a significant change for a business and for the change to be successful there are a number of elements that needed to be in place to support the transition.

- Multiskilling of the staff
  - Leadership support for the change
  - Management information systems in place to provide transparency of work and performance.
- Having the work processes aligned to type to work is critical to optimize the performance of the business. deliver sustainable change.

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