

Business Process Improvement Case Study - As time is money and speed matters, our expert team of practitioners integrate with your teams to achieve unprecedented results, fast. Our unique approach can make that happen for your business

# CASE STUDY

## Change of Tenancy - Process Improvement

This energy co. has been supplying gas and electricity to both to small and medium sized businesses since 2013. The company identified that there were inefficiencies in the way they were processing COTs. Notifications of COTs came into different areas of the business, leading to delays in processing as contacts were passed to the Admin Support Team without complete customer information. Final balances on outgoing tenants' accounts were sometimes missed, increasing COT related debt. They saw a need to direct all COT notifications into a single point of contact – a team that would have the accountability and empowerment to own the entire E2E process, from notification to final bill.



## The Challenge

To review current processes, activities, systems and the customer journey, delivering efficiencies by creating a new COT Team; resulting in less errors and omissions, generating greater speed to COT processing and ultimately reducing COT related debt.



Get to know the team and the processes and find out what was working and what wasn't.



Work with the team to reach a collective understanding about what industry leading COT process looks like.



Coach and develop the team in end to end COT Processes, RACI, Comms & Training and Project Management.

.....and all remotely

Understanding and improving COT process.



## Priorities

- Through interactive and collaborative workshops, build a common understanding of what a good COT process looks like.
- Understand accountabilities and responsibilities – and the associated training requirements
- Agree how we measure success – what metrics will we use, what targets do we set?
- Visualise everything

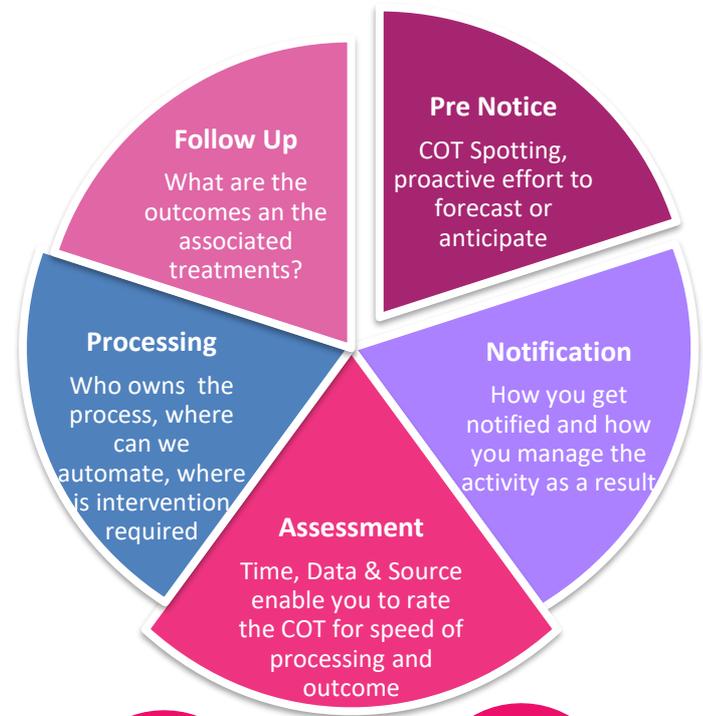
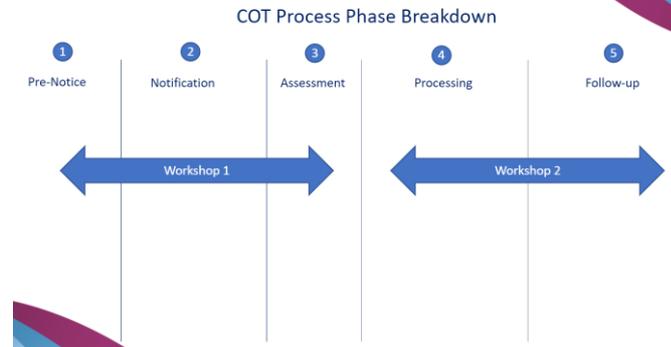
# The Activity

To make this a fun & collaborative experience, we first got the team familiar with working on our fully interactive digital whiteboard. We then set up a series of virtual workshops, progressively walking through the 5 steps of the COT process.

We discussed and agreed 'what looks good' at each stage and compared this to their current practices, helping to identify what needed to change. From this, we agreed on a set of key principles: what is important when processing COTs, speed, fewer handoffs and interventions, continuous measurement and having a minimum set of data.

We identified current data sources to track performance against agreed targets, providing the team an 'at a glance' Visual Management Board to monitor progress. A clear set of accountabilities & responsibilities was then defined and visualised through a RACI Matrix to ensure clarity.

A comms pack was designed, providing the wider business with sequential progress updates and an agreed training package was created to ensure all the parties had the skill and competence to carry out their related tasks and responsibilities.



01

Policy & Process

Established a key set of COT process principles and reached a common agreement on efficient COT process, based on leading industry knowledge.

02

MI & Analytics

Designed a Visual Management Board so the team could view performance vs targets at a glance based on an agreed set of KPIs and metrics.

03

RACI Matrix

Created clarity on who was Accountable & Responsible for certain activities and who needed to be consulted or informed when certain activities had been done.

04

Comms & Training

Compiled a sequential comms pack and developed a training package to ensure all parties were competent in their related roles and activities.

**The Outcome**

There is a well-defined and mapped out COT Process and Policy, with fewer hand offs and a clear view of COT Processing performance landscape, all resulting in reduced COT related Debt. Reduction in final COT bill value indicates the improvements made in speed and efficiency, reducing financial and business risk.

