

Consulting case study

Reengineering research service delivery

The need

Two separate departments in a busy professional services firm were undergoing a merger, as part of an overhaul of the entire knowledge and insights function.

The change offered a great opportunity to:

- Re-think the entire workflow
- To create greater efficiencies
- Use the best of people's talents
- Better meet the needs of the internal customers.

However, members of both teams had some scepticism about changing processes for work they were very comfortable with -- an underlying tension was a question as to whether any jobs were at risk.

The new head of the combined knowledge and insights team asked Jinfo Consulting for help creating a structure and process for analysing and reengineering workflows. Of equal importance was to bring in these ideas and practices in a way that engaged and excited the team and allayed their anxieties about change and job security.

Project impact

From the two assessments, we decided that an in-person workshop incorporating fresh ideas for workflow with a team-building opportunity would be valuable. Preparation included:

- Development of workflow recipes by multiple team members to form the basis of a reengineering activity
- Jinfo interviews with representatives of internal customers, to better understand how current workflows were (or were not) creating results that truly met their needs.

We used these inputs, along with the full results of the assessment, to plan the discussions and activities of workshop.

The workshop was an enormous success, both for team-building and energy, as well as for the practical results that would support reengineering the service.



"The whole assessment process was valuable. Even the survey questions highlighted gaps and opportunities in our service. The assessment results highlight the most valuable areas for us to focus on in the short term and provide a useful framework for discussions with stakeholders."

Senior manager, information & library services

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Consulting case study (cont'd)

Reengineering research service delivery

Participants found it extremely valuable to come together as a single group, start to get to know the broader team, and swap notes about how they do their jobs, what they enjoy and where their frustrations are. They all benefitted from hearing directly from customers about their needs (something they'd never done before in this format).

The group activity to learn and practice the reengineering process was an eye-opener. Four groups created new, more efficient workflows from the same building blocks, and all were very different - highlighting the fact that there is no "right" way to do this work, and encouraging everyone to think creatively about how things could be done in the future.

All participants left the workshop feeling they understood the strategy behind the change and the complementary skills the two teams bring together. The day eased most concerns and helped everyone feel valued and included in the process.

A number of practical next steps were identified around:

- Technology improvements
- Immediate changes to process and deliverables to better meet customer needs
- Areas ripe for training and cross-pollination between teams.

We also identified a number of needs for further research, as well as barriers to achieving the benefits the firm wants to realise.

Jinfo Consulting's final report included recommendations for activity prioritisation and extending the team engagement through the difficult work of change.

Jinfo Methodology

1. Assessment - workflow
 - a. Brainstorming sessions with sub-teams on their workflows
 - b. Assignment to document at least two recipes
 - c. Gather information on tech and culture
2. Assessment - team morale
 - a. Interviews with team managers
 - b. Interviews with team members
3. In-person workshop development and delivery
 - a. Context-setting discussion
 - b. "State of the industry" dialogue
 - c. Facilitated customer panel
 - d. "What is scalability?" session
 - e. Group activity: reengineering recipes
 - f. Group debriefing
 - g. Reporting and recommendations

Start with one workflow

Process reengineering is a fundamental skill for cultivating departmental resilience and value. Try out the process with the help of Jinfo Consulting -- we'll walk you and your team through development, analysis and reengineering of one workflow. Most teams free up hours of staff time through this process.

Test our methods and get immediate results before committing to the kind of comprehensive project that can transform your thinking and capacity.

[Start the conversation »](#)

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