- The end result of the project was the creation of agile customer-centric processes allowing the AAG to embrace change rather than reject, control or suffer from change and the high demand on agility. The results included enhanced capability for knowledge workers and management to make quick decisions to ensure that processes generated the desired results.

Clear Programme elements:

- The Customer Delight Programme comprises the Customer Delight Framework; Customer Touchpoint Model Positioning Map; Change Controllers, Process Maps and Action Lists; effective and easy access to, and management of Corporate Knowledge;

- MS SharePoint was selected as the central repository system and is used to manage version control, process templates and the capturing of knowledge gained from lessons learnt;

- A Centre of Excellence (COE) was established to design and document the core and supporting business processes.

- Skills were transferred to the COE team (Quality Champions), through on-the-job shadow and formal training. The focus was on the VizPro® methodology and MS Visio™ - on how to effectively use the technology;

- Results: Agile customer centric processes were developed, allowing the AAG to embrace change rather than reject, control or suffer from change and the high demand on agility. The results included capability for knowledge workers and management to make quick decisions to ensure that processes generated the desired results.

11. Conclusion:

Achieving results through Adaptive Case Management is possible only when people, processes and system align and support one another. By creating a clear, easy to understand, management and staff supported Customer Delight Programme that includes a Customer Delight Framework and clearly defines in each relevant process "who" needs to do "what" to ensure that process outcomes *and* customer services are effectively and efficiently delivered, continued benefit is realized and results are monitored.

- The approach was uniquely suited to the introducing customer-centricity into the enterprise at every level as the easy-to-understand visible format conveyed the message in a simplified format which was easy to follow and implement.

- The approach fostered complete management support through its collaborative and interactive storyboard design work sessions;

- The project offered the holistic approach that was required by management and the relevant stakeholders to analyze the Solution Delivery Division processes in order to achieve realistic and practical customer improvements;

- The VizPro® methodology provided insight and a clear road map on how to achieve strategic objectives and organization-wide customer- centricity;

- The project required only simple, low IT to deliver a high impact methodology that enabled case-based solutions and highlighted essential customer touchpoints;

- The project, through its use of VizPro®, created participation and buy-in through interactive, high-energy workshops, resulting in user-friendly and information rich process maps. This moreover, led to the "wow" factor as abstract processes effectively come to life as visual storyboards through the use of icons that tell the story of each process in comprehensive detail. This is the unique characteristic of VizPro®.

- The project provided a voice to every knowledge worker participant that added to innovation and improved practices through effective collaboration.

- By facilitating discussions amongst process stakeholders from all organisational levels it enabled real-time collaboration of ideas and innovations that aided in designing, tailor-made customer-centric processes.

- The project ensured the best possible outcome by including stakeholders that lived the processes and its frustrations day-to-day, knew what to watch out for and have learned how to get past the hurdles. They have seen things go wrong and now had the opportunity to be part of the solution.

- The project provided clear programme elements. The Customer Delight Programme comprises the Customer Delight Framework, Customer Touchpoint Model, Positioning Map, Change Controllers, Process Maps and Action Lists which are all effective and easy access tools for the management of Corporate Knowledge.

- The project made smart use of technology by using MS SharePoint as the central repository system. The SharePoint was used to manage version control, process templates and to capture knowledge gained from lessons learnt in a timeous manner.

- A Centre of Excellence (COE) was established to design and document the core and supporting business processes.

- Skills were transferred to the COE team (Quality Champions) through on-the-job shadowing and formal training. The focus was on the VizPro® methodology and MS Visio™, and particularly, on how to effectively use technology.

Business Change Management	Process stakeholders initially showed resistance to the work sessions, but after having been exposed to the VizPro® methodology ,there was effective buy-in. This resulted in excellent, enthusiastic and high quality participation as it provided a platform forstakeholders from different levels of the organisation to contribute to the design of the customer-centric processes in a manner that addressed their specific process-related issues.
Process stakeholder availability	Many of the stakeholders felt that they had "more important" work to attend to. Once they experienced the VizPro® approach however, they saw the value it brought to their work lives. They also saw the project as being an opportunity to collaborate and develop innovative solutions to challenges faced on a day-to-day basis.

9. Pitfalls to avoid when using this methodology

✘ Do not waste time. Deliver and show benefits and value as immediate value ensures continued participation and commitment from management all the way through to employees;

✘ Do not underestimate the power of putting the right resources into the project. The relationships fostered in this way ensures the delivery of effective work sessions, and effective work sessions means delivering quick value to the client;

✘ Do not waiver. Be secure and precise in the tools and techniques, be clear on the approach and explain in a way that every single person understands what is happening, why and what the end goal is;

✘ Do not complicate matters. Keep it simple;

✘ Do not underestimate the effort required. Prepare participants to what lies ahead and to the fact that it is hard work, with long, intense hours.

10. Why the innovation in the project is noteworthy

A number of reasons can be listed on why the innovation in this project is of significance.

A number of reasons can be listed on why the innovation in this project is of significance.

- it requires only low cost IT - MS Visio™ is used to produce the process maps and Microsoft Office Excel for the Action Lists. These documents are stored on the SharePoint Drive;

- recording a vast amount of knowledge in real time;

- enabling knowledge share and alignment through effective engagement;

- creating clarity on who does what, why and how and what the rules of each ACM instance are, as defined in the Customer Delight Frameworks;

- enabling a transfer of skills to update the process maps (1.5 days for training in AAG);

- aligning and linking each process to AAG's strategic direction and to specific business goals so that role players see the clear line between what they do and how it impacts on business goals;

- enabling group agreement
    - on actions to be implemented to ensure effective and efficient processes that are measurable;
    - on risks that need to be managed;
    - on how to attain Customer Delight; and

- agility as the tools and techniques are flexible and customisable to ensure that what is needed can be designed into processes and systems, provided that there is enterprise agreement and buy-in.

8. **Key challenges experienced during the project and how they were addressed (lessons learnt):**

Challenges	How they were addressed
Gaining senior management and executive buy-In ✔	Senior management and the executive team were key in the development of the Organizational Positioning Map. In this work session the focus was on the benefits of having customer-centric processes and how it would impact on the bottom line. By focusing on these elements, immediate buy-in occurred through discussion and collaborative verification of the benefits, along with the commitment to ensure continuous benefit realization.
Overcoming functional thinking ✔	Prior to the rollout of the project, AAG focused on traditional functional structures such as marketing, sales, operations, HR etc.
	The process sessions effectively communicated how approaching business processes from an end-to-end perspective would add value in service delivery. Once senior management and the executive team saw the outcomes of the work session, which clearly identified the value stream from its origin to to the end customer, there was immediate buy-in.

Issue #	Category	The issue	What must be done	What must be achieved	By whom	When	Status
1	Undelivered Items	Participants not available to receive their delivery at the provided address which results in late deliveries.	Create/Reinstate an Attempted Delivery Notification card that can be delivered when the participant is not at the Delivery address.	* Customer delight point * Participants informed of attempted delivery and whether the item has been dropped at an alternative address * improve 3rd party reliability	Natasha Greg	2010/09/01	Closed
2	Service Recovery	Service failure is dealt with on an adhoc basis and is not formalised	*Create a Service Failure spreadsheet that lists the issues such as delivery to wrong addresses / non adherence to processes *Service Failures must be consolidated and reviewed on a mothly basis * Natasha to provide cost estimate for the implementation	* Standardised way of dealing service failures * Agents aware of consequences	Noori Tanzil	2010/08/01	Closed

Figure 10: Example of an Action List which records follow-on activities needed to ensure that change and improvement is executed.

How the Action Lists were used in AAG:

The Action Lists per process were populated and updated in real time during each mapping session. While working on processes, whenever a task needed to be recorded, the process architect would toggle to the Action List and record the action, stating :

- what the issue is;
- what needed to be done;
- what the desired outcome is;
- who needed to action the listed activity; and
- by when does it need to be done.

The benefits of the Action List:

The Action List:

- enhances ownership;
- it facilitates agreement of what activities or projects are needed to implement improvement, and
- it is a critical implementation management tool.

4.3.3   Key benefits

The key benefits of this process approach, which highlights the competitive advantages in addressing ACM as described in this case study, include:

- a saving of time - the work was concluded in 45.5 project days, over a period of 6 months utilizing one specialist consultant (6 days), two process architects (31 and 7 days respectively) and a project coordinator (1.5 days);
- effective use of staff time, limiting the loss of work hours for the client - 25 key people were involved in the project, impacting on approximately 150 co-workers, all of whom are part of the Customer Service delivery chain;

- governance elements, including statutes, policies, standards and directives, ensuring that these were considered during ACM instances.

The average time spent per version 2 of the Process Maps was between 4 -8 hours per process.

Benefits of using this approach to Process Mapping:

The benefits include:

- fostering an understanding by process stakeholders of the end-to-end processes in terms of who does what, with whom, when and how;
- identifying and improving process efficiencies, which positively impacted on cost, time and quality;
- clearly defining roles and responsibilities through the creation of visual Process Maps;
- highlighting the flow of documentation within the organisation, which ensures a clear audit trail;
- providing a cross functional view of the business instead of the traditional departmental view;
- ensuring that MI and KPIs are relevant and that they provide the right performance information at the right time to the right decision makers;
- defining process risks and agreeing on the controls to mitigate them;
- clearly defining and linking interrelationships between processes (within the organisation and within the Solution Delivery Division), people and systems;
- identifying process inefficiencies, bottlenecks, gaps and weaknesses;
- increasing performance and staff morale as people understood the "big picture" and the importance of their respective roles in it;
- knowledge transfer taking place and improving teamwork;
- enabling the development of training and induction material by using the process maps as a starting point;
- identifying competency level gaps and developing training programmes to address them; and
- ensuring a high buy-in into business changes since the process stakeholders were involved in the design of the process and understood the background of the change.

D. The Action List

The purpose of the Action List

The Action List records the drivers for change. Whenever an item or an activity is identified during a workshop as an issue to be addressed, it is added to the Action List. The "who" and "when" is then agreed to by the participants.

compromise Customer Delight. Service recovery rules were developed to ensure sufficient guidelines for those occasions when service fails.
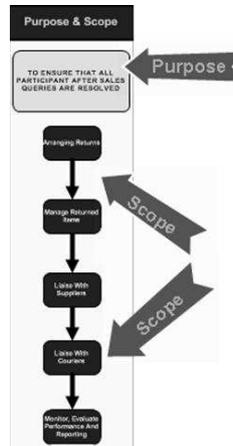

Figure 9: Snapshot of the Purpose and Scope of an AAG Process Map

The average time spent on each version 1 process map was between 8 and16 hours per process.

Version 2:

Up to 12 people joined this version to discuss, challenge and debate each of the version 1 Process Maps, with the aim of adding improvements. This session included subject matter experts, external process stakeholders (organisational staff that had an impact on the processes) and cross functional management teams. This session provided opportunity for further design, collaboration and agreement that was particularly impactful in terms of information sharing and clarifying process risks and ACM.

Specific emphasis was placed on the following during discussions:

- Customer Delight and Service Recovery rules;
- risks and control points, specifically defining risks and the relevant mitigations that could be implemented;
- defining management information (MI) points where information is gathered;
- locating accounting points where cash or stock enter or leave the process and may impact on ACM;
- quality assurance points;
- key performance indicator (KPI) points, what indicator is applied to measure which element of performance and linking this back to the Performance Profile referenced above;
- burning points that resulted in bottlenecks or breakdowns in delivering services;
- points of escalations where the process executor required relevant Delegation of Authority to authorise certain transactions; and
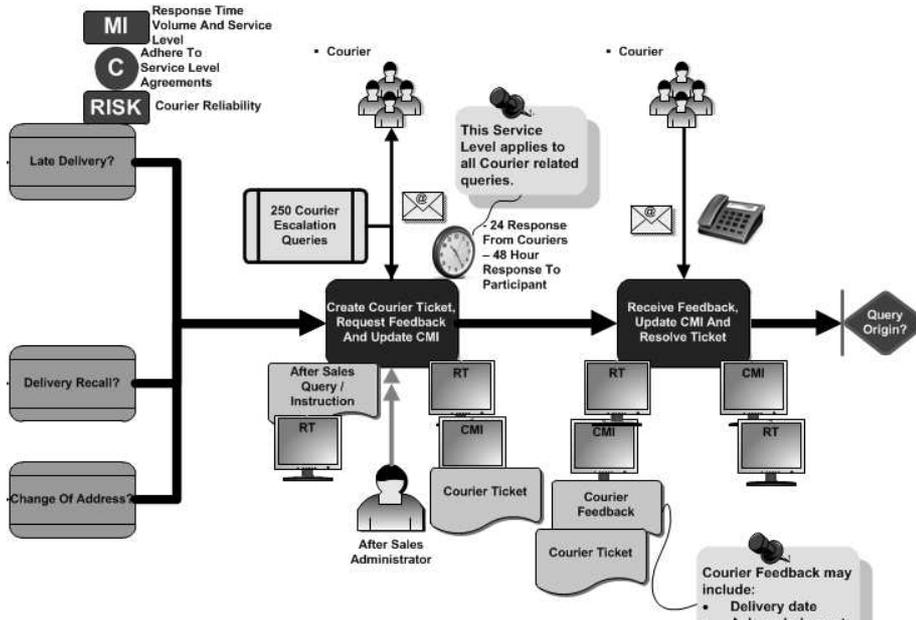
Figure 8: Snapshot of a VizPro® process map: section snapshot .

How the processes were mapped in AAG:

For each process the work session started with a blank screen. After agreeing the name of the map, the purpose and scope of the process was defined, discussed and recorded (refer to figure 9). From this starting point each process would be recorded, developed and improved upon - step by step.

The AAG Process Maps contained the following:

- customised icons;
- roles and responsibilities;
- customer touchpoints;
- opportunities for customer intelligence / feedback gathering; and
- areas where case-based solutions were needed and had to be executed according to response or activity Frameworks that incorporate Customer Delight Programme elements.

The Process Maps were developed in different versions:

Version 1:

Up to 8 people were invited to unpack the "as is" (i.e. the status quo), adding notes on changes to be made, where needed. Discussion included subject matter experts, Process stakeholders and management.

These sessions gave process stakeholders a forum to voice concerns and highlight challenges, problem areas and bottlenecks and to suggest solutions. It also aided in the collaboration of ideas and innovations whilst enabling the development of Frameworks on how to engage with customers in specific processes, and at specific points in the process. By doing this , the principles of Customer Delight could be built into each Framework ensuring the identification of the "do's" that would achieve the Customer Delights goals, as opposed to the "don'ts" that would

After each process mapping session, participants worked through the elements in the Change Controller to ascertain whether the process did indeed adhere to these requirements. These were categorised as such:

Status	Definition
"Not clear how to achieve it",	This means that there is a gap that needs to be addressed.
"In Action list for implementation"	This means that change actions have been defined, scheduled and assigned.
"In progress"	This means that it is incorporated in the "as is" or "to be" process, i.e. it forms part of what needs to be done and outcomes will reflect the process impact on the particular element.
"Concluded"	This means that the process outcomes are supporting the relevant element/requirement.
"Not applicable"	This means that the process is not intended to address the element.

Each Solution Delivery Division process map contained the same Change Controller against which the processes were tested to make sure that it contributed towards the strategic goals. A process would only be signed off once aligned to the Change Controller.

Benefits of using the Change Controller:

The benefits included:

- enabling Case Managers to list their process "WGLLS" and align these to enterprise goals;

- clarifying what each process should aim to deliver on;

- ensuring that there is a common direction when mapping processes in order to guarantee that the activities that occurred in each process would in fact bring about the desired results, as defined in the WGLLs and the CSFs; and

- ensuring final signoff of processes, since the Change Controller is the last step for final approval.

C. Process Mapping

The purpose of process mapping and processes

Each process clearly defines a number of related aspects, namely a) what needs to be done, b) who does it, c) why is it done (i.e. "what outcome am I trying to achieve by doing this activity?"), d) who is involved in each activity, e) how does communication take place, and e) how to achieve improvement where notes highlight specific "how" tips. Each process step incorporates the value system of the enterprise by default and shows what needs to be done to achieve process outcomes. It also defines process management elements, such as what risks occur where, what controls are applied and where information is gathered with which to measure results (see figure 8).

The Change Controller lists the "must do" elements in a matrix format. When reviewing each process against its particular Change Controller items, there are five status options (see Figure 7 and below). The status profile derived from the Change Controller gives a good indication of the level of support a particular process lends to the enterprise goals.

Figure 7: AAG Change Controller.

How the Change Controller was applied:

AAG's key strategic objective, as defined during the work session, included "to be excellent at servicing customers". To achieve this, the group agreed that it was necessary to address processes and align people and systems to:

- ensure that the organisation became more customer-focused;
- improve service delivery;
- develop customer centric business processes;
- develop agile processes that ensured quick management decision making;
- develop fluid processes that provided for innovative, creative and out-of – the box case-based solutions;
- create a customer excellence and continuous improvement culture;
- create a centre for excellence or Process Management Office (PrMO); and to
- create sustainable continuous improvement.

The Change Controller was developed to ensure that the Solution Delivery Division processes supported the company's strategic objectives. Each Case Manager had the opportunity to list their individual WGLL statements for the division. Once these statements were translated into goal definitions, the team agreed on what was critical for continuous improvement and to become a customer centric organisation. These prioritized goals were then added to the Change Controller. In the case of AAG, strategic goals were identified in the following categories:

- Growth;
- Consumer Focus;
- Organizational Structuring; and
- Organizational Management.

Figure 6: Positioning Map in which the processes that are needed to attain the value chain steps results, are identified and prioritised

How the Positioning Map was applied in AAG:

The Positioning Map (figure 6) was developed with both the senior and executive management teams during a one-day work session. It depicts what value the organisation creates and required 8 hours to develop and complete.

A key strategic objective for AAG is to actively manage the entire business to a customer focused value system. The management team agreed that the Solution Delivery Division should be "unpacked" as it would render the quickest and highest impact outcomes in respect of Customer Delight.

The Solution Delivery Division contains many customer touchpoints, which means that this division needs to be highly adaptive and agile to each customer case that enters the process. Each of the Solution Delivery processes had to be designed to be fully aligned with the strategic objective(s) of being profitable, yet also being highly customer centric.

The processes and activities thus needed to be designed to incorporate the characteristics of adaptability and agility whilst ensuring customer centricity, yet with enough flexible to deal with specific cases and enabling continuous improvement.

Benefits of using the Positioning Map:

The benefits included

- identifying and agreeing the key "must achieve" elements for each process that would collectively deliver results in support of enterprise goals;
- identifying the processes that make up AAG's value chain from start to end;
- identifying the critical processes needed in order to steer the business to being a customer centric organisation;
- providing direction in organising and developing a cross functional approach, instead of the traditional departmental approach;
- providing a high level view of the organisation and how all the processes interface to ensure effective service delivery; and
- identifying the scope, the process owners and stakeholders for each of the Solution Delivery Division processes and establishing the schedule for the Customer Delight Programme roll-out.

B.   Change Controller

Purpose of the Change Controller:

The purpose of the Change Controller is **to list those** minimum requirements that each process must adhere to in order to attain enterprise goals. These are derived from three sources, namely the CSFs and Performance Profile developed in the Positioning Map and from the "What Good Looks Like" (WGLL) statements developed by work session participants.[1] These requirements are created by prefacing the source statements with the question "does this process…."

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[1] When defining desired outcomes, the term "What Good Looks Like" or WGLL, (pronounced "wiggle") is applied to guide responses in order to define what the desired process results must or should be.
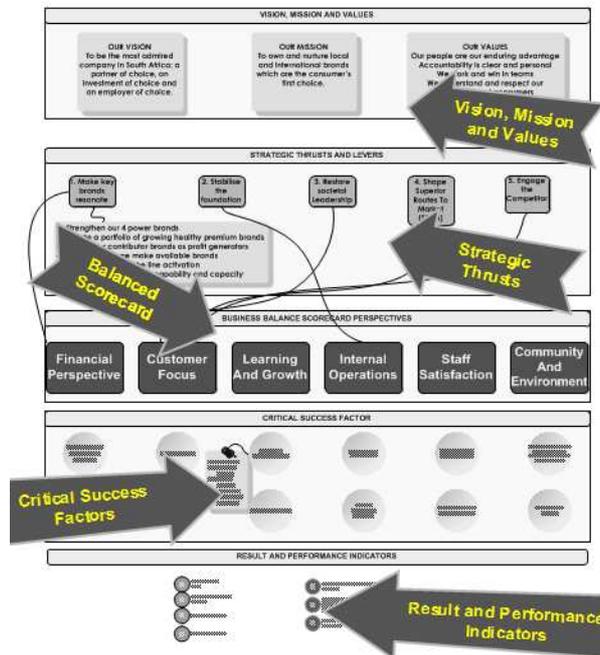
Figure 5: Snapshot of the Performance Profile

To complete the linkage between process, strategy and vision, a level one map is developed to show in five to six broad brush stroke steps what the enterprise "does". The processes to achieve these outcomes are then taken from the basket of processes defined in the Performance Profile (see figure 5). Having positioned the processes in the enterprise value chain, the group then agrees on which processes are critical to the outcomes and will bring the quickest improvement results if unpacked.
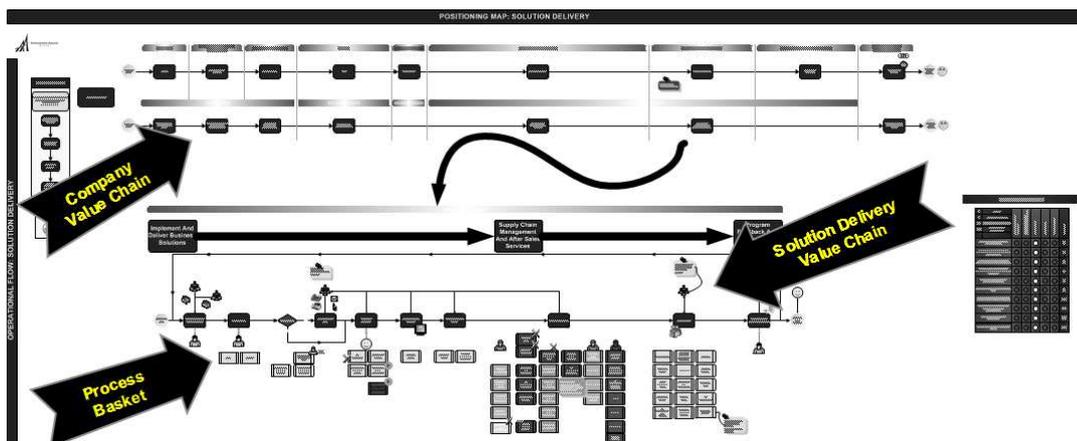
Each of the process elements must converge to synchronize people, activity, systems and artifacts to achieve agreed-to outcomes. These outcomes or results per process, in turn, must support the enterprise goals.

The process mapping methodology applied in this project was, and will for the foreseeable future be, VizPro®. It was chosen due to its ability to:

- build easy to understand, highly visual storyboard format processes;
- obtain immediate buy-in and support;
- build agile processes quickly and efficiently;
- gather corporate knowledge and expertise into process maps through interactive and collaborative work sessions; and
- build Customer centricity.

7.2 How Process was applied

Business process architecture includes understanding (i.e. analysis), developing, modeling, documenting and improving business processes, end-to-end. Unstructured or ad hoc processes are processes that cannot be clearly defined, and allows process stakeholders to develop the "what to do" as they execute the process, within defined guidelines or "the how-to" when many different scenarios present to the process role player. These are typically used in environments where there are many ways in which to execute and activity and execution is impacted by each circumstance

VizPro® lends itself to this by being a process documentation and analysis methodology that enables and facilitates Business Process design, architecture and buy-in. It applies the power of pictures and the effective use of narratives to show how processes support the enterprise goals - process-by–process and step-by-step. It engages process participants, role players and stakeholders in high energy mapping sessions where knowledge is captured and immediately converted into step-by-step maps. Workshops engage all session participants, thus leading to lively discussions that are informative and aimed at building improved practices. As a decision on the "who" does "what", "why" and "how" is taken, the information is captured and projected, thus creating a clear understanding of each step, along with immediate buy-in.

The following innovative process development, assessment, alignment and **mapping elements** resulted in multiple benefits and facilitated innovation in ACM in AAG:

A. Organizational Positioning Map

The Purpose and Creation of a Positioning Map:

Similar to enterprise architecture, but focused on creating links between processes and strategic goals, the aim of this map is to **link enterprise vision, mission and values** to a Performance Profile in which the strategic direction and goals are mapped. It furthermore identifies how each process will and must be designed and managed to achieve a common set of outcomes.

Each strategic directive and goal is linked to one or more critical success factor (CSF), which is in turn linked to a balanced scorecard focus area. Next, the processes that will impact on achieving those CSFs are identified and listed. The indicators per focus area are then recorded using process icons.

- a clearly defined action plan to drive behaviour change; and
- identification of and alignment on customer information collection points to generate intelligence that would facilitate customer centricity, continuous improvement and the development of metrics to monitor progress.

7. Success Factor Three: Process Mapping as the vehicle to plan, define and deliver Customer Delight

The Customer Delight Framework needed to be "dropped" into processes that were deemed too structured for an effective and efficient Customer Delight focus. In particular, the project participants identified the following as being the result of rigid structures:

- stifled creativity and innovation;
- slow responses to market changes as case-based solutions were not possible;
- non-adherence to the processes;

In addition, the following problems were identified:

- existing processes were not a true reflection of what was being practiced i.e. processes were not aligned with practice;
- there was a lack of efficient and effective communication, especially when there were service breakdowns i.e. when things went wrong;
- there was a lack of process accountability; and
- management and front-line staff were not aligned on how to deal with specific cases as they presented; and

As a result of these insights, the following needs were identified:

- the need for a clear collective understanding of customers' needs and how to "wow" them; and
- the need for an agile processes that were easy to manipulate and quick to respond to market changes and customer requirements.
- the need for a Centre of Excellence to manage and maintain templates, business processes, version control, action lists, business improvement projects, etc;

It became evident that the project needed to incorporate the Customer Delight Framework into existing processes. In cases where there were gaps, new processes either had to be created or current activities had to be enhanced to ensure the inclusion of those elements needed to bring about Customer Delight.

7.1 The Motivation for deploying Process Mapping to fast track ACM into the enterprise

Process is the vehicle that states what activities are needed for specific outcomes. It also states who needs to do these activities. To be effective, process must clearly tell the "story" of the activity, i.e. identify the role players, pinpoint the risk areas, determine how to address exceptions and define the controls to be built into the flow - to list only a few of the many elements that are needed for a process "story".
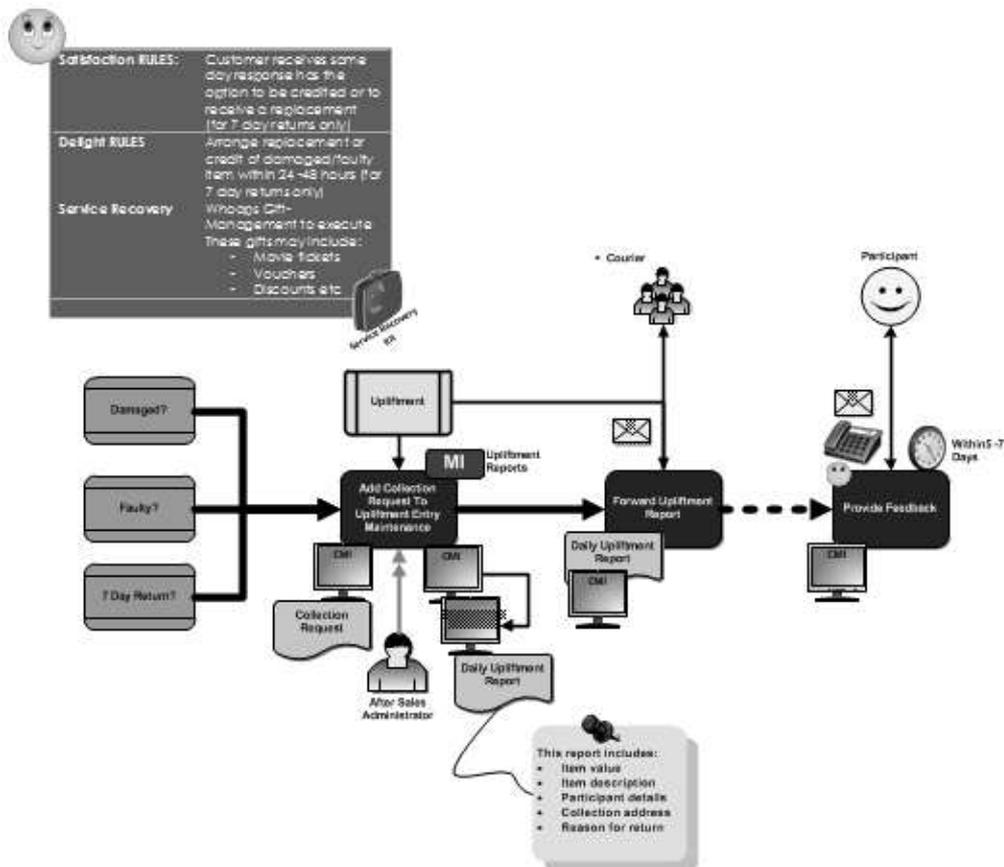
Figure 4: Snapshot of the After Sales Process, reflecting a Customer Delight Framework specific for this part of the process.

Figure 4 depicts how the Customer Delight Framework was applied. Each touchpoint was analyzed and through facilitated work sessions, agreement was reached on a) what to do in cases of Service Failure (Service Recovery), b) what practices would meet Customer expectations (Customer Satisfaction) and c) what opportunities and actions would exceed customer expectations (Customer Delight). The key customer information collection touchpoints (listening posts) were also identified. This enabled AAG to generate customer intelligence that ensured better understanding of their customers which, in turn, fed into the AAG processes for continuous improvement.

Benefits of using the Customer Delight Framework

The benefits include:

- identification of critical touchpoint directives, or rules, to design customer centric processes;
- identifying ways of improving the customer experience and formulating these into framework directives for process role players;
- agreeing on ways to re-design areas with the greatest customer service inefficiencies in order to improve on responsiveness and, ultimately, profitability through customer retention and cost savings;

How the Framework was applied

Once the Framework was agreed to, the customer touchpoints were identified, added to the Change Controller (a VizPro® artifact that ensures process focus, as described below) and each touchpoint in the process defined.

The touchpoints were categorized as follows:

Customer Touchpoint category	Definition
Customer Satisfaction	Meeting customer requirements or delivering what has been promised.
Customer Delight	Touchpoints that will provide opportunities for delight or exceeding the customer expectations.
Service Recovery	Based on the understanding that in a service industry, things WILL go wrong, this answers the constant question "What steps must be taken in the event of service failure?"

Figure 3: This is how a Delight Touch Point as referred to in figure 2 was elaborated on.

Figure 3 shows how information was captured for one of the customer touchpoints. The touchpoint was split into the Satisfaction, Delight and Service Recovery categories, and rules developed to satisfy each category's definition.

- quality Improvements in how call centre and customer contact processes are executed; and
- clear performance indicators have been implemented.

4. Key Innovation Elements

The principal success factors for this project were as follows:

a) to ensure Executive and Management Support,

b) to participate in developing and adopting a workable Customer Delivery Framework (see below), and

c) realise or actualise this Framework in the day-to-day operations by making use of a process mapping and management approach (VizPro®) that ensures clarity and alignment, and most importantly deliver results through buy-in and enterprise wide participation VizPro® is highly customizable and ensures clarity by using a detailed, storyboard format that produces real time mapping whilst simultaneously engaging knowledge owners and stakeholders in high energy, high impact work sessions (similar to JAD sessions). Innovation, adaptability and engagement converged to produce a project that was delivered speedily and which resulted in immediate, as well as medium and long term benefits.

5. Success Factor One: Senior and Executive Management Buy-In

Strong, visible sponsorship was essential for the enterprise roll-out of the Customer Delight Programme. A project kick-off meeting was held whereby senior management and the executive team were introduced to the Customer Delight concept and particularly, how this needed to be integral to the what needs to done- (i.e. process), by whom-, why-, when- and how-steps. Throughout the project feedback on progress, issues and stumbling blocks were shared and addressed.

The innovation was in the **way that engagement and consensus were achieved**, using the VizPro® methodology, described below.

6. Success Factor Two: Customer Delight Framework

A two-pronged approach to imprint Adaptive Case Management in AAG was followed, based on the questions "What will we do?" and "How will we do it?" The "What" needed to be defined in terms of Customer Centricity and Delight and the "How" needed to be expressed in activities, or processes - hence, the focus on the AAG Customer Delight Framework and Processes.

First, the Customer Delight Programme (CDP) was conceptualized, discussed, developed and agreed upon, using the Disney Approach to Quality Management and Customer Care as the departure point, followed by designing the CDP into processes This programme would drive the Customer Delight Framework for each relevant process where Adaptive Case Management was needed.

The Purpose of the Customer Delight Framework

The Framework was developed to describe the general directives of what and what not to do when specific circumstances present themselves. The purpose of the Framework was to identify, for each relevant process, the customer touchpoints and link them to the relevant categories (see below).

Figure 2: A snapshot of Customer Delight Rules, describing what will need to be done to attain a state of customer satisfaction,and what needs to be avoided.

Pétanque Consultancy (www.petanque-c.com) partnered with AAG, deploying one Specialist Consultant, two process architects and one project coordinator. The IT applied included two consultant laptops, MS Visio™, MS Office and data projectors. Key processes were printed on AO paper and the final output was framed and displayed in the AAG offices.

3. Results

The feedback from the AAG Project Office four months after the initial roll-out stated: "Through our Customer Delight programme, we have been able to implement improvements in the After Sales Support, Courier and Stock Handling areas. As a result, we have cut down on back orders and delivery times. This has led to slight increases in our Customer Satisfaction Index (CSI) scores and compliments and also a reduction in complaints. Quantifiable results will be made available at the end of 2011."

Results in the following areas have been realized, and continue to do so:

- Cost saving through reduced time-to-customer and cycle time, as well as reductions in returns and queries;

Profile

- It was established in 1980;
- the founder and current CEO is Geoffrey A. Amyot;
- the Head Office is in Westlake, Cape Town;
- the fulfillment centre/3260m^2 warehouse is also located in Westlake, Cape Town;
- it has three certified Human Performance Technologists on staff;
- it is a single source provider;
- it has strong project management infrastructure;
- it has entered into a strategic partnership with Maritz Inc. (USA);
- it has produced more than 800 incentive programs to date;
- it has touched the lives of about 1.5 million South Africans to date; and
- its in-house services include a creative studio, a web/new media team, an IT development team, a banking/management information centre, a catalogue/supply chain team, an IATA certified travel agency and a VOIP enabled call centre.

Service portfolio

- "Get a holistic perspective on your business;
- examine your cultural climate;
- support staff development through learning;
- motivate, recognise and reward performance;
- manage rewards and fulfillment requirements; and
- support back-end program requirements"

The project

The requirement was to partner in the development of an easily implementable Customer Delight Programme (CDP), based on the Disney Approach to Quality Management and Customer Care and effectively implement it by designing Customer Delight into proceess. The aim was to achieve customer excellence and continuous improvement.

The CDP comprised two aspects. First, the development of an operating model to address the requirements and challenges faced by the organisation. And second, an innovative design of customer-centric processes that would be easy to understand and implement, be aligned to business strategy, would be clearly defined, and would have the flexibility to deal with deviations that are part and parcel of the business of dealing with diverse customers groups. The CDP was to be infused into processes using VizPro®.

As one of the key outcomes, this programme created an AAG organizational-wide awareness amongst knowledge workers, support teams and management which resulted in buy-in that truly embedded customer excellence and a continuous improvement culture in all AAG activities.

1. Executive Summary / Abstract

Adaptive Case Management (ACM) is imperative in enterprises where the exception to process becomes the process!   ACM, a topic widely discussed and analyzed by academics, professionals and IT specialists, is what is needed whenever processes must react to changing and diverse customer or client needs and interactions to ensure efficient and effective outcomes. This means that defined, rigid processes become responsive to circumstances that require fluid processes in order to address specific requirements.
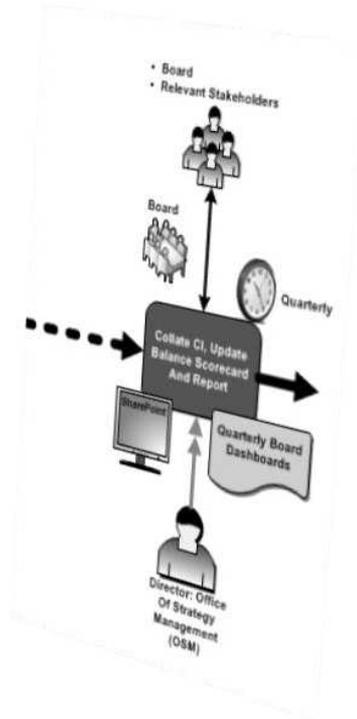
Achievement Awards Group (AAG), based in Cape Town, South Africa, recognized the benefits of adopting ACM as a critical success factor in attaining their strategic goals, and in response to their changing, diverse and unique customer requirements. The focus of AAG is to effectively and efficiently attain what they term "Customer Delight". The business of AAG includes predicting and responding to customer needs. No margin for error is allowed. Period.

This meant that absolute process agility had to be defined, designed, agreed upon and be continuously revisited.   In the context of AAG, knowledge workers are the process executors, while stakeholders include customers and AAG shareholders.

A Customer Delight Framework, incorporating dynamic, unstructured process and process rules, was designed to deal with cases that require deviation from standard processes. These cases often require agility to ensure that desired process outcomes are achievable, regardless of the scenario.

Figure 1: A snapshot of VizPro® Process Step

The Customer Delight Framework was superimposed into the business processes by using a collaborative, real-time and highly visual process mapping methodology called VizPro®. This easily understandable methodology clearly maps out who does what, why, where and how. It enabled role players to collaboratively design agile customer centric (outside-in) processes that are able to deal with a diverse set of cases or scenarios. In short, VizPro® facilitated an out-of-the-box mindset to design effective responses to customer needs.

What follows is a record of the roll-out of the Customer Delight Programme and the approach used to design dynamic processes which ensured quick management decision making, enterprise-wide adoption and execution of customer centricity.

2. Client and Project quickview

AAG (www.achievementawards.co.za) is a medium sized enterprise in the business of designing and delivering full-service incentive and performance improvement programmes for clients.

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ACHIEVING CUSTOMER DELIGHT THROUGH ADAPTIVE CASE MANAGEMENT

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Case Study

Achieving Customer Delight through
Adaptive Case Management

Pétanque Consultancy

Clearly Better