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| Summer School Accommodation Bookings |  | **INSTITUTION**(*Commercial Operations*) |
| The RATIONALE What prompted you to participate in the PPR workshop? |
| **Purpose** | PPR has been applied to a particular event, the summer business, managing accommodation at the University for 10 different summer schools, which happens once a year over a period of 4 months. Accommodation booking is an important part of the wider process and involves two separate teams. The way to address a process like that is to get everybody together so PPR offered a good way to achieve this and get the process structured. Equally I wanted the team to learn the skills to be able to apply it to other processes, so I thought this area was a meaty process to start with that they could learn from.The process had changed organically and we wanted to devote some time to actually improving our process and learning from each other in a way that could be applied to other processes. As a manager, I didn’t want to be in a situation where I said to people you needed do this or that. I wanted them to come to that conclusion themselves and as a team, to understand and to work through it so that they could see if similar problems were also occurring in other processes. |
| **Stakes** | Summer schools generate approximately £3m revenue for the University each year and it is an increasingly competitive business. A relatively small number of clients are involved and the service we deliver to them is critical in gaining repeat bookings and ensuring we continue to deliver budgeted revenue and surplus. The process review looked at how we manage the accommodation bookings over approximately 12 weeks in the summer. This covers 2,500 bedrooms, 10,000 students and 100,000 bed nights. The conference and accommodation teams at all 6 halls are affected and our summer school clients and the students who stay here. An area we already had in mind that we needed to change was the accommodation booking process for summer school students. It's a key operation and the largest part of what we do, since it affects both our clients and our facilities. Although it's a wide ranging process, it's actually quite a contained set of tasks. It's a linear process, but has lots of strands. |
| **Objectives** | * The accommodation booking process is a key area in our relationship with our clients and by improving it we can deliver on our customer service promises.
* Identifying operating efficiencies that have the potential to save resources and increase surplus is an added benefit.
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| The PROBLEM What was the issue, challenge, opportunity the review focused on? |
| **Context** | We decided to focus on one area that we already knew to be over processed, check-in/check-out for language schools. When students come, the problem we have is managing the volume of information; it’s thousands of people arriving over a 6 week period. There was a realisation that what we were doing is asking clients for a lot of information that we, as the venue, don’t actually need. It’s the client's duty of care to manage all of this and we just need enough information to provide the rooms that they need. For example, we were collecting lots of information about the students in each and every one of our rooms and that was about 2000 rooms, but then the students would all be moving around and we’d be constantly updating all of this information.Our process had developed over a number of years and, as most processes do, started to include things for very valid reasons at the time they were included, but over the years it becomes unwieldy and I think there were things that we weren’t really sure why we were doing them and what benefit they were giving.  |
| **Need** | Accommodation booking is a process that involves our clients yet seemed designed more with our needs in mind than our client’s needs. A tension in the process that affects our clients is that if they don’t provide the information, we can’t provide the service that they want but I was thinking if they’re having difficulty providing us with the information, maybe we’re asking too much from them, maybe we’re asking for the wrong kind of things at the wrong time. I wanted the clients' experience to improve as well as it being more efficient and effective for the team. We wanted to remove unnecessary strands of work, since the actual work around arrivals/departures was taking up almost half of our working week, which is an unnecessarily large amount of time for what it was, what it should be.One of the things that we wanted to achieve was to hand responsibility back to our clients for information about students in residence. Because we were taking students' names at check-in, the clients were coming to us to locate their students, whereas for us, halls don’t need to know who is in the room, they need to know when that room is occupied and when it needs cleaning. So our teams, both the conference team and our Halls' reception team, were spending an extraordinary amount of time chasing after our clients' clients.  |
| **Participants** | The workshop involved the two key teams that operate and used the process being reviewed, so they were feeding in what it was like on the ground and what they needed. All but one members of the Accommodation team were there and then we brought in someone from the Halls of Residence who manages one of the reception teams. |
| The SOLUTION What did participating in the process review achieve for you? |
| **Key understandings** | The problem of over processing stems from wanting to do a good job and it stems from things that happen over time, you do things for a reason and then perhaps that reason is gone but you still carry on doing the aspect of the process.Clear ownership of the process and buy-in from the team is essential. The PPR generated a balanced discussion as opposed to people taking roles. It was just a general discussion where people give ideas and it was a small enough group to get people to contribute to the discussion. Everybody understood the goal and that was key for this to work well.There are three of the team who work operationally, and for the two present at the workshop, PPR has made a big difference. The third member of the team couldn't be there on the day and has always felt out of step with it a little bit, because she wasn’t involved from the beginning, didn't have an input and perhaps felt less of a sense of ownership. |
| **Intended outcomes** | * Resolving the current tension between our operational requirement for information in advance and our clients’ business model which relies on a last minute allocation of rooms.
* Improving efficiency and customer service and thus our clients' experience of accommodation booking with us
* Increasing the team's skills in undertaking effective process reviews.
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| **Light bulb moments** | One of the biggest light bulb moments for us was actually seeing the existing process mapped out. We always knew it took a long time to do everything, but just seeing how many steps we incorporated, how much pressure that put on our clients to provides us with information, and how much pressure is put on our Halls to log the information when it wasn’t needed. That was a big eye opener for us, an understanding that we’ve clearly made assumptions about the needs of teams that we work with. In trying to be helpful and provide them with lots of information, what we were actually doing is overloading them with pointless information and it was hiding the importance of what they did need to know so that was sort of a mini light bulb within it. Although it took us quite a long time to map the process out, it was a good visualisation thing. The whole mapping out was quite tricky because there's so many strands to it, there was a lot of to and fro about where this or that should sit and a realisation that there was lots of things in the process that weren’t really adding benefit. |
| **PPR techniques** | The team really liked the structure and visualisation, which gave us clarity. Everybody was on board that this process had become unwieldy and needed to be simplified, so PPR a) clarified how the process was and b) helped to draw out those things that actually could be removed. PPR gave us the framework for doing it. The big thing was being able to highlight what elements were essential within the existing process so as to strip it back to the bones of what we needed. We knew what was contained within it, we were quite familiar with that, but it was the sheer size of it that was unexpected. It was daunting knowing where do we start. The PPR facilitation focused us on looking at what were the key points in the process, what were things that had to be hit and what was the timescale involved in it. We sat down and we questioned why are we doing things this way, for example: why we asking our clients to give us this piece of information, what would happen if we didn’t have it or simplified it. It actually made us realise that there are probably a lot of areas needed review within our summer business programme. |
| **Actions / next steps** | A participative approach to process review worked well for us, because we brought senior managers in from our largest hall. If we hadn’t had that person there, we would’ve ended up with something different mapping out the new process; it wouldn’t have been as relevant or as good. We just took the lead from her as being the expert, because they’re on the ground doing it, they’re the people who interact with the client at that moment.The workshop was all a really positive experience for the team and expectations were raised. However, we learned that there can be some unintended consequences; it’s not the complete answer. It's important going in to recognise its limitations and what else you need to do afterwards, such as communicate to stakeholders, and that some things might not work.  |
| The RESULT What are the tangible outcomes & impact? |
| **Immediate changes** | We implemented the new process last summer for the first time and there were some teething problems, because it was a radical shift from what we’ve done in years before. The big change that we made didn’t have the impact that we thought it would. One key area of information that we changed was around the task of updating student information for the language schools, which proved problematic. So it was mixed benefit at this stage. |
| **Improvements made** | The process review allowed us to identify and take out some time-consuming elements and also areas that we felt had been generating tension/conflict. The process map still has quite a lot of elements in it, but for instance one element that we took out in itself was actually a very time consuming activity, so that made a big impact. It’s still quite a long process, but it’s not as long, and maybe we took out 20% - not a huge number.Other tangible improvements we can measure include the extent to which we:* increased the speed of check-in/ check-out for our clients
* reduced the unnecessary pressure on our reception teams
* reduced the amount of time that we ourselves spent on it .
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| **Evidence of benefits** | The stripping out elements exercise that we did made an instant impact and the changes were really good; the evidence is from customer feedback and the amount of time that team had to spend doing a certain task that freed them up to do other things. Some of the elements we'd taken out improved the relationship with the clients that we hoped for; they were really pleased that suddenly they weren’t being asked to do all of these things that they used to have to do, so that was an immediate benefit. This is evidenced in feedback scores after the summer; we gather quite specific feedback, and we have scores and targets for that feedback. In this way, we were able to look at the improvement in the scores from our clients which is one of the key performance indicators.The changes made a huge difference to staff in the Conference team since they are now able to get information to the Halls on time and it's really reduced the workload they have. In terms of efficiency gains, what we were able to measure is reduced overtime that staff had to work. Traditionally in the summer, claims for overtime and lieu time are quite high, regularly working 2-3 hours longer each day through the summer, because staff had to spend a lot of time on this quite complex set of information and that was almost completely abated last year. There other reasons behind that so it's not entirely because of this process, but it certainly helped. The first summer we implemented the change, our overtime total was almost nothing. |
| **Unintended & unexpected** | By not communicating widely why we were making one of those changes, there were bits of negativity, from which we recognised that perhaps that was down to the fact that we haven’t communicated it as well as we could have done. For instance, the people this impacted made wrong assumptions about why we were making them, a negative assumption about why the change had been made to reduce our burden or responsibility, as opposed to a positive one, because our clients were struggling to provide the information we ask for. None of the Accommodation team really anticipated either how unnerved the Halls Reception team staff would be by not taking students' names.  |
| **Longer term impact indicators** | At the time of the PPR, we were thrown into a busy operation, you're just kind of doing it and see how it works. The longer term impact is more from managing it afterwards, drawing on the lessons we learnt the first time we implemented it, and taking those lessons and putting them into the process the next cycle, which is more explanation to the teams about why we’re doing it and being able to get feedback from them on how it works.  |
| Lessons learned - what experience has been gained? |
| **Prior experience** | The PPR was different to other process reviews we are involved in on a day-to-day basis, because this allowed us to select a specific area that we wanted to improve as opposed to an audit where you’re reporting on lots of different areas. Although we have things like Hospitality Assured accreditation and are audited every year for continuous improvement, they set the agenda, they set the range of criteria. With our PPR, we were able to say here is something we specifically want to improve; it doesn't have to fit into someone else's format or structure. |
| **Participative experience** | Where there is a tendency in a team to over process, PPR can open the door to simplifying all processes, looking at them in a critical way and asking why are we doing this, do we need to have all of this paper work, all of this lengthy process. On a day-to-day basis, people tend to think what else can we do rather than what can we stop.The number of people involved needs to be small enough so everybody can be heard and big enough so you get different opinions. The key skill is being able to be self-critical which can be difficult accepting the self-awareness and being prepared to recognise and say that things aren’t right. This was some challenge to the people who are perhaps more naturally forceful in expressing their views. Some people felt uncomfortable, as they get wedded quite closely to processes. It’s quite difficult to be open to possibilities rather than coming along with set ideas of how to approach the change. Sometimes the team have just taken a process and done really well with it, but other times you need someone to facilitate a little bit and point out where the assumptions are being made or the team aren’t being as open as perhaps they think they’re being. Some of it is about the nature of the team. In our case, being event organizers the team are very organized, which means probably it's a natural tendency to want every 't' to be crossed, every 'i' to be dotted, whereas actually sometimes you need to be a little more organic in the way that you work; you just can’t process every possibility. It's also about relinquishing the need to control everything. This is uncomfortable for some people who like to be in control or when you say let’s not do that anymore. When people manage a lot of information, they feel they want to be in control of it, but actually they don’t always need to be and that transition can sometimes makes them feel uncomfortable.The good thing about the PPR was having such a defined area to look at. Since it was looking at one process, and we were constantly being brought back to that, having a formalized process overcame the tendency when reviewing to go off on a tangent and stay focused. |
| **Personal skills / application to other processes** | Before PPR, staff were not really thinking of and looking at a process in its entirety. People would just come do their job and if something wasn’t working they might change it a bit, but they wouldn’t necessarily look and the whole thing, which now they do. It’s completely changed the way we work. Now the team are constantly doing process reviews, such as for our enquiry handling. We have now done 8 or 9 and reviewed almost every aspect of our summer business using the PPR technique. Whilst perhaps the other processes haven't been done quite as formally since the first one, the skills are still used. For example, we didn’t do the terms of reference quite formally but we did have outcomes that we wanted to achieve from the process. The team self-drive process reviews now, using the flow chart way to map out each element of it; we’ve become quite speedy at doing it. We don’t use any of the software so when we came away from the first workshop we used a process management software and we find that rather unwieldy for what we were doing, we found it a lot quicker to create our own flow chart. One particularly important process was more formally managed, as it involved a team restructure to manage an existing process, one that was working well, but we split the way it was handled. It’s an enquiry process that before was dealt with in its entirety by our coordinators, it’s now split so that the new sales and marketing team take one element of it and then they hand it over to the operational team. It was the same process but we had to work through how that process was going to work in this new way. |
| **Success tips** | * A big process change can be uncomfortable for people, so communicating and involving the people who weren't involved in the process review directly, but who are impacted by it, is a critical aspect. Through process review, you can solve one problem but you possibly create another. The big outcomes stem from re-reviewing to see what worked well from the changes made and where adjustments are needed.
* As a team, we learned the importance of better communication beforehand, taking time and effort to explain the changes to the process enough to the other people, so the rationale filters through to the wider teams our process impacts. Because the team owns the process, a lot of effort has gone into the process, it can be easy to forget that you haven’t told everybody else. You forget not everybody has spent as much time on it as us or know about the rationale for changing things.
* Being patient and prepared to refine the process changes, to expect that when you solve one element, other challenges arise. In our case, we all felt there were some problems with one element of the change that we made, but agreed we needed to give it another go before we reach conclusions. Because it was a lot of effort that went into the process review, so you don't just stop doing it because there was an issue, you look at why there’s an issue and what we can do to improve that.
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