

The people's choice

Synectic was finding its meetings-based system of managing workflow inefficient. In addition, the system allowed people to be disorganised, which affected the outcomes of planning sessions. Manager Suzanne Forrest describes the company's cultural change and how it took place.

In July 2004, AG Synectic Pty Ltd decided to start using BankLink Workflow Manager. "We needed to change our job management system to help us gain control, build better client relationships and provide career progression planning. Some team members were concerned that the tool would hurt our client relationships, or be 'big brother-ish'. Rather than pushing it onto those who were hesitant, we understood and accounted for initial resistance."

This approach had great results. "Those who were unsure about using a workflow management tool came round to BankLink Workflow Manager without feeling pressured."

“*BankLink Workflow Manager has been a great investment for us, both culturally and financially.*”

Suzanne Forrest, Manager
AG Synectic Pty Ltd



The effect on our culture has been noticeable. BankLink Workflow Manager helped people take on more responsibility and ownership in their time management and client relationships."

Suzanne says that BankLink Workflow Manager has improved the company's staff management. "We're more systematic and forward-thinking in the way we induct new staff, manage the capacity of our current staff, and set up career development programmes. The scheduling aspect of BankLink Workflow Manager is especially good for junior staff – they know what to expect and can better manage their own time."

Fact File

AG Synectic Pty Ltd

- > Devonport, Tasmania
- > 13 staff, 2 Directors

Challenge

"Our system for managing our workflow involved a number of team meetings, which were often time-consuming and inefficient. If a team member was ill-prepared or less organised, the productive results were reduced for everyone in the meeting. Our planning only catered to the short-term, and was very reactive."

Impact of BankLink Workflow Manager

- > Staff are more empowered
- > We can plan activities such as training, practice development and software development
- > The flow of work is smoother – the peak times are less busy
- > We can deliver integrated services to clients over an agreed annual timeline

Results

- > Turnaround times have gone from 12 weeks to 4 weeks, for 90% of jobs
- > Work in progress has gone from \$83k to \$41k
- > Our cash flow has improved
- > Our profit has improved
- > We have more chargeable hours



Managing Expectations with BankLink Workflow Manager

Without BankLink Workflow Manager

Input Expectations



Output Expectations



With BankLink Workflow Manager

Input Expectations



Output Expectations



Suzanne explains that, in addition to streamlining their workflow and boosting staff morale, BankLink Workflow Manager has been a catalyst for other cultural changes at Synectic. “Our internal communications have improved as a result of using BankLink Workflow Manager. Staff are more aware of output expectations, they can plan for leave and time management has improved. They don’t need to panic when unexpected things come up as they can see how things fit into their existing priorities.”

“Our mentoring programme is now more formalised and effective, because the communication between the mentor and mentoree has improved. Mentorees can identify potential issues and conduct their own planning in preparation for mentoring meetings. BankLink Workflow Manager also helps mentors recognise the demands on the mentoree from a company-wide perspective.”

Suzanne says that BankLink Workflow Manager has been a beneficial investment for the company financially, as well as culturally. “People are doing more chargeable hours, and are more committed to achieving good turnaround times. Since implementing Banklink Workflow Manager our WIP, cash flow and profit have all improved.”

“Across the practice, the whole team is putting in more effort”

“As a firm, we now have the ability to forecast available time for activities such as training, practice development and software development. We can see when extra capacity is going to be available, and plan to generate additional business to fill that capacity. We’ve been able to improve our relationships with clients by delivering integrated services over an agreed annual timeline.”

For more information about how BankLink Workflow Manager can streamline your workflow and scheduling, call us on 1800 123 242 or visit www.banklink.com.au