



## Process and Performance Manager

### Work smarter and more efficiently

The activities and working practices of your Revenues and Benefits Team are a key source of efficiency savings.

Process and Performance Manager from Capita Revenues and Benefits enables organisations to implement their own standard efficient business processes and measure team performance across these processes, providing a wide range of business benefits:

- **Reduced processing costs** – staff follow the standard, most efficient process avoiding the problems, time variances and costs that occur when staff complete tasks in diverse ways.
- **Reduction in training periods for new staff** – staff are guided through the system with immediate access to notes explaining the process.
- **Faster processing** – staff automatically taken to the correct place in the system with data pre-populated ready for processing. Processes can begin in Electronic Document Management Systems (EDMS) and seamlessly continue into Revenues and Benefits
- **Faster identification of training needs** - staff performance can be measured and compared against colleagues and benchmarks
- **Refined processes** – different processes for specific tasks can be trialled with the results measured and compared with previous processes, before being rolled out.

In addition to delivering efficiency savings, Process and Performance Manager **improves your organisation's protection of sensitive personal data**. This application enables local authorities to monitor and identify inappropriate access to accounts and claims by recording all access regardless of whether an update is made.

### Key elements of the Process and Performance Manager

#### Process flows

Process flows are made up a series of tasks that must be completed to finish the process. They are completely user-definable enabling your organisation to decide:

- What tasks form the process
- Which screens staff are is taken to for each task
- The benchmark time for completing the process
- The additional notes available to assist users throughout the process.

Process flows may be started from your desktop or initiated from an EDMS system, and seamlessly continued into the Capita Revenues and Benefits solution.



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### Performance monitoring

Performance monitoring functionality enables you to measure individual, team and process performance. For each process started the Process and Performance Manager records a range of detailed information including:

- **The staff working on each individual process**
- **Start and finish times for individual tasks and overall processes**
- **Levels of completion for individual tasks and total processes.**

This information can then be interrogated using the powerful Process and Performance Manager reporting tool, which provides instant reporting without the need to run batch reports. This tool presents data in easy to interpret charts and graphs that are dynamic enabling users to apply filters, such as for a specific period to see the results instantly. The tool also enables staff to 'drill down' for further details and instantly see the results. The performance-monitoring tool enables you to:

- **Identify training needs** – compare staff performance against benchmarks
- **Monitor staff performance** – measure the effectiveness of contractors and home workers, and obtain information for performance appraisals
- **Identify the best processes** – measure and compare the impact of standard and alternative processes.

The screenshot shows a detailed view of a process flow. On the left, a tree view lists tasks such as 'Process a new DD instruction', 'Check previous DD history', and 'Issue DD Confirmation Letter'. The main area displays metadata for Instance ID 39, including start time (04.06.2009 09:30:00), elapsed time (17 mins 49 secs), and benchmark information (Benchmark Effort: 25 mins, Benchmark SLA: 1 hrs). A progress bar indicates the current status is 'Incomplete'. Below, a 'WorkItem' section shows 'Issue/Print Bill or Adj. notice' with its own start and completed times, and an action 'Open Notice periods (c11020)'.

Process and Performance Manager - Process flows

The screenshot displays a dashboard with three pie charts: 'Processes by User (Team A)', 'Processes by System', and 'Processes by Type'. Below the charts is a table titled 'Processes exceeding benchmark' with columns for Application, Process Type, Reference ID, Process ID, External Ref, Started, Completed, Efforts Used, and Elapsed Time. The table lists three entries: 'Benefits Change in Circumstances', 'Council Tax Prepare Committal Case', and 'Business Rates Process SBR application'. At the bottom, it shows 'No. of Cases: 3' and 'No. of Cases still incomplete: 2'.

Process and Performance Manager - Performance Monitoring