

HR CASE MANAGEMENT | CASE STUDY

“A smooth transition from scoping, through training to launch”



At a glance:

Client: TSB Bank plc.

Location: UK-wide

Industry: Commercial Bank

Challenge:

TSB Bank required a new, reliable HR case management system with improved MI capabilities and ease of use.

Solution:

TSB chose Workpro HR - the standard product meeting all their needs for functionality, ease of use and management information.

Implementation and training were carried out remotely, with collaboration and user engagement key to the project's success.



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“The engagement and experience felt good from the get-to”

Around a third of TSB’s 100-strong HR department work in the people services team, handling payroll, HR systems, and HR operations for more than 6,000 employees. With so much to do – from tracking up to 60 cases at a time to producing regular day-to-day HR support and advice – they need a reliable case management system.

Since adopting Workpro HR in April 2021, five case managers and five team members in advice and guidance have been using Workpro to manage cases and log advice records. In just a few months, they saw a huge improvement on their previous systems.

Round peg in a square hole

The HR people services team had a case management system, however it was an IT ticketing system that had been adapted to hold case information. This brought a number of challenges.

When an employee left the company, all record of their information vanished from the system – meaning the team had to find a workaround to avoid losing valuable post-employment data.

The system was also far from intuitive, with no prompts to guide users on what comes next. On top of that, pulling management information was tricky, making the system “next to useless” for any kind of reporting. Something had to change.

Simple, practical insights

When it came to choosing a new case management system, the team were looking for functionality, ease of use and management information capabilities. The standard Workpro HR product met all their needs.

“Our IT system team found the contact from the Workpro team to be excellent – the engagement and experience felt good from the get-go.”

Stephanie Dunn, HR People Services Manager, TSB Bank

A breeze to embed with our team

The Workpro implementation team moved quickly to implement Workpro HR for the team. Scoping, implementation and training were all completed remotely due to Covid restrictions in place at the time.

Key to the quick, seamless integration were:

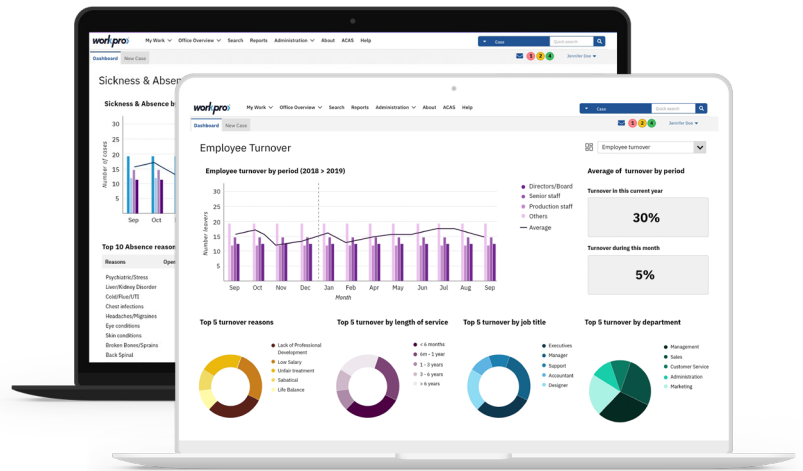
Early engagement with users – a small team of superusers were involved in the project from the early stages. They took part in business requirement workshops and tested the system to make sure it met their needs.

Collaboration on business requirements – the implementation process was collaborative but structured. The Workpro team laid out what users needed to consider before workshops, then adjusted functionality to make sure the system worked for them.

Engagement & collaboration, the keys to quick implementation.

“It has been such a smooth transition from scoping, through training to launch. The system has been so well received by our case handlers. And any snagging, which there inevitably is, has been dealt with in a timely manner. It’s a big thumbs up from me!”

Stephanie Dunn, HR People Services Manager, TSB Bank



Results to date

The system went live in April 2021. After one month of use, the team found efficiencies in how quickly they can create and access data. They’re also more confident – no more gripes about the session time-outs or lost documents they’d experienced on the previous system.

And the benefits are clear when it comes to seeing comprehensive case histories (ideal for passing cases to a colleague) and the ability to spot trends and analyse cases. The team also uses the data from Workpro to identify areas where they can be more efficient throughout their case management process.

The big picture? The team aims to reduce case handling times by 15-20%.

A happy team

The response from all the users at TSB has been positive.

“The team members are absolutely delighted with Workpro. They have picked up using the system brilliantly. It is intuitive and user friendly and you can easily work through the steps.”

Stephanie Dunn, HR People Services Manager, TSB Bank

The team loves the flexibility that Workpro offers while still making sure everything is done by the book. In fact, TSB is planning to increase the number of users to help manage more complex queries – and you can’t get a more positive review than that.

Ready for a more reliable HR case management system?

Find out more about Workpro HR by scanning the code or email us for a free demo at workpro@casltd.com



Workpro case management system is developed by CAS - an employee-owned technology company.
www.workpro.com

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