Business Client Services

Summary

Using Lean principles, the New Hampshire Division of Economic Development Business Retention Team improved its internal referral process and data tracking mechanism, which ultimately enhanced client services.

Accomplishments

Streamlined business client referral process

Established standardized operating procedures

Created accurate data collection and reporting methods

Team

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The Service

The New Hampshire Division of Economic Development works with businesses across the state providing resources and expertise to help them grow and prosper. The Division's six-member Business Retention Team provides one-on-one technical assistance to businesses of all sizes and sectors. It connects companies with programs, services and partnerships to give them a competitive edge here and around the globe.

The Problem

Although the retention team has utilized a database management system for years, there was no standardized process for documenting client referrals, or the history, challenges and services companies used. Team members had their own individualized approach to referral management and business development, thus creating a limited and inconsistent use of the content relationship management (CRM) database. The challenge was ensuring consistency of response and tracking of referrals with other agencies and partners.

The Goal

Apply Lean principles to standardize existing procedures in order to ensure proper and timely follow-up for businesses throughout the state. Lean also enables the retention team to generate tangible goals to measure its progress and impact in New Hampshire's business community. The ultimate goal is to enhance customer service to clients and formalize the existing referral process.

The Lean Process

- Identified challenges with our client referral procedures and the need for Lean process improvement
- Selected key staff members to participate in the Lean project based upon work assignments and the need for fresh eyes
- Mapped the current state
- Identified inconsistencies and bottlenecks in our referral process
- Determined 'monuments' and challenges to making change and progress
- Identified Kaizens (*projects for improved efficiency*)

- Identified the resources needed to develop a standard operating procedure (SOP) for business referrals
- Mapped the future state
- Set goals and a timeframe for implementation of the new SOP
- Scheduled the 'sell' with the Project Sponsor
- Conducted Beta test of new SOP and database changes
- Worked with internal partners to ensure their buy-in to the team's new SOP
- Went live with the SOP, CRM updates and referral process on Jan. 1, 2013
- Continue to review and refine SOP and referral processes

The Results

After implementing Lean process improvement, the retention team's business referral activities are more streamlined and efficient. The team's new SOP for tracking referrals ensures consistent follow-up, which ultimately provides clients with the highest level of customer service at all stages of business development. Other programs - within the Division and those overseen by our external partners - have also adopted the SOP to enhance their client customer service. Because the CRM is more user friendly, it allows us to more effectively capture relevant client data as well as develop reports on client visits, issues and challenges New Hampshire businesses are facing, and referrals both to and from the Division of Economic Development.