

Managerial evolution

Catherine Black and Nigel McAvoy investigate a collaboration between document management specialists, Destin, and Dumfries and Galloway Council

It is easy to forget how revolutionary document management was. It was more than just minimising storage costs, enabling backups and reducing the time to access documents.

Through simply providing the ability to view a document simultaneously from multiple locations, document management provided massive scope for services to reorganise how work was done.

With telecommunication advances, access to documents can now be provided securely, cheaply and remotely. And with the convergence of document management and other technologies, the scope for changing how services are delivered has also increased.

Nigel McAvoy, Managing Director of Destin Solutions explains: "The direct savings document management systems make are relatively small. The real benefit is in what they enable. Some of our clients have improved productivity by 40% through initiatives such as home working or creating a dedicated front office, which would have been difficult without document management being in place."

Performance management using workflow

Nowhere is this more evident than at

Dumfries and Galloway Council. Catherine Black, Principal Officer, Business Review and Development, explains: "Over five years ago we started a transformation on how we used our document management system. Instead of limiting it to managing documents we have made it an integral part of our approach to managing processes and performance.

"We began by streamlining our processes and changing how we worked. For example, our supervisors used to be involved in the distribution and sequencing of work, but those tasks are now automated by the software. Today our supervisors are focused on identifying and removing blockages to performance within their team.

"Critically, information is collected by our document management system on every piece of work from initiation to completion. This information is a key input into our approach to managing staff performance and improving our processes."

The method

"If you think about it, the overall performance of a service comes down to how each employee completes individual work items," explains Nigel. "If you can collect information on the journey of every work item through the service, you will have an extremely rich set of data identifying how work is processed. Collecting this information would normally be a Herculean task, but modern document management and workflow software does it automatically.

"However, to make this work the design and maintenance of the workflows is critical. Not only are they routing work through your organisation they are now collecting data that you will use to analyse and forecast performance.

"Once you have that right it is all about delivering the information to the right people at the right time in the right way. Heads of Service will want summary information on the whole of their service, Principal Officers will need more detailed information on their areas of responsibility, supervisors want information on their team members and assessors will want to see their contribution to the service."

It's all about attitude

Getting to this point required a lot of staff commitment. Catherine explains: "Changing how you work is going to cost you productivity in the short term as you adapt, so there is always the temptation to revert back to doing things the old way. The key to our success was always having a clear vision of what we wanted and having the management commitment at every level to achieve it."

Nigel concludes: "Dumfries now has a great tool to assist it in managing performance, but more important is its willingness to strive for improvement. Without this attitude, performance management is just an empty exercise." ❖