

Process Streamlining using STAR Method

Introduction

STAR method is a structured approach to focus on **Situation, Task, Action, and Result**. Not so long ago, I was assigned to a newly established campaign that was experiencing significant challenges in terms of process streamlining. I took several initiatives to streamline the process, and below, I've attempted to outline the thought process behind those initiatives.

Method in use

Business Type: Medical Record Retrieval

Process: Data Entry for new requests in accordance with specific case-to-case requirements

Situation

- Communication gaps among team members
- Lack of structured workflow for case processing
- Ineffective training and incubation approach
- Absence of proper quality monitoring
- High dependency on individuals for routine queries

Task

- Fix Communication gap
- Introduce Quality Control Mechanism
- Revamp Training Approach
- Promote autonomy

Actions

- Communication
 - Created centralized Updates file documenting each update with date, received from, title, description and how it was shared with the team
 - Regular team briefings ensuring successful delivery of updates
- Quality Control
 - Phase 1 – started with documenting errors with sections of CRM tool to determine Accuracy and to quantify the pain areas which could then be later used for refresher training
 - Phase 2 – prepared structured questionnaire, identified auto-failure points, and submitted Quality Form for approval
- Training
 - Conducted refresher training sessions based on pain areas derived from Phase 1 of Quality Control
 - Submitted recommendations to reporting manager requesting required changes for training of new batches
- Promote Autonomy
 - Developed structured workflow for case processing, documented it in Job-Aids and added them to every agent's desk as Visual Reminders
 - Created a user-friendly Master Reference file to reduce dependencies and empower independent decision-making

Result

- Significantly improved process autonomy, making agents more confident while processing cases
- Avg daily case count increased from 45 to 52 and Avg Accuracy for case processed increased from 80% to 92% (approx. 15% increase in overall KPIs)