

## Allocate ER Tracker Case Study

# CMP increases productivity and saves 140 hours a week on HR case reporting

### Background

For 30 years, it's been CMP's ambition to create workplaces where people can really be authentic, bringing their 'whole self' to work, without the fear of conflict.

Established in 1989, CMP is a leading provider of dispute resolution training and services to UK businesses. With clients spanning across Government, pharmaceuticals, education, enterprise and the charity sector, CMP helps employers reduce the financial and human costs of conflict at work.

Its team of experts are specialised in a range of services including outsourced HR investigations which look to close workplace complaints such as grievance, disciplinary and whistleblowing. As well as workplace mediation, conflict management and preventative training for managers and staff – aimed at helping colleagues to resolve differences directly and constructively with one another.

### Managing case loads

With up to 35 live investigations or mediation cases on the go at any one time and vast amounts of associated documentation, CMP's investigators were facing considerable administration when it came to securely updating clients on the progress of their live cases.

Leanne Holt, Head of Operations and Client Delivery at CMP explains: "Due to the sensitive nature of our work, documents associated with workplace investigations and disputes must be securely sent to our clients. In order to do this, the team had been converting these documents into PDF format and password protecting each individual item that was sent over. Sometimes there could be up to 200 documents linked to one case and this made the securing and sending of files very time consuming, often involving multiple emails as the files were too big to send all at once."

With this in mind, the team at CMP sought a dedicated HR case management system. They required a solution which would allow them to efficiently manage multiple client investigations and cases at any one time. As well as providing a transparent and streamlined way for clients to access pertinent case information. Fluctuating workloads also meant that the operations team needed the system to help with the management of internal workloads, spreading cases evenly between CMP's investigators.

### Real-time access to case information

Building on an already successful partnership with Allocate, CMP went live with Allocate ER Tracker on 1 October 2018. The new system is used by CMP's experts, and clients, namely key individuals in the HR department.

Cases are categorised into two distinct types (investigation and mediation) allowing the team to record and monitor their investigations more efficiently. The system also provides an increased level of flexibility and visibility to CMP's clients as they are able to access Allocate ER Tracker at anytime, anywhere, to see what stage their case is at.

Leanne explains: "All the case documentation is securely stored in one place and this has meant that clients are able to go into Allocate ER Tracker to access case documentation and download reports, all without our assistance. The process of information sharing has been greatly streamlined and clients are no longer having to access multiple password protected documents. For the team, sharing reports in this way has saved them a considerable amount of time, at least 3-4 hours per week."



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Head of Operations and Client Delivery,  
CMP

## Enhanced workload visibility

Allocate ER Tracker's real time dashboards also give a top line overview of activity for performance monitoring. This feature has been beneficial to CMP's client delivery team as it has afforded them with full visibility of the mediation and investigation teams' caseloads and progress.

"Before Allocate ER Tracker came into place we used a spreadsheet to manage all live investigations between the team. Each investigator was tasked with updating the spreadsheet at the end of every month, detailing what stage each investigation was at. As the business grew, this method became more problematic and time consuming, making it difficult to decipher the availability of each investigator. We knew that that we wanted to streamline our current processes and updating spreadsheets wasn't an efficient use of time and left us open to errors," comments Leanne.

Storing all case information centrally in Allocate ER Tracker has allowed Leanne to easily log in to the system at any given time and see what stage an investigator is at on a case. As well as their availability and the total number of live cases across the team.

Leanne goes on to explain that: "The team has an operational meeting every other week and the holistic view of information offered by Allocate ER Tracker has streamlined the process. I'm now able to select individual investigators and pull up their current caseloads and download them as reports. This enables me to give an accurate and real-time view of our business capacity and has saved me a few hours a week in time as I'm not having to update spreadsheets or chase investigators for a status update on live cases."

## Enhanced compliance

The length of investigations can vary but the team at CMP have a 30-day SLA in place with many of their clients. Leanne says, "Allocate ER Tracker allows us to easily see how investigations are progressing and whether there are any delays. This increased level of visibility enables us to intervene earlier and provide support to our mediators and investigators if they need it."

## Working with Allocate

Communication and support has made the deployment of Allocate ER Tracker for the team at CMP easy. After establishing that the system could help them achieve the visibility and efficiency desired, Allocate provided comprehensive training to the consultants. Running webinars and a training day which allowed the team to ask questions and gain a clear understanding of how the system worked.

Leanne concludes that, "The team at Allocate have always been really supportive of any suggestions or questions we've had and are continually looking for ways to make the system work well for us. The team has gone above and beyond. Before we went live, they demonstrated the system to one of our main clients to ensure they would be comfortable accessing and retrieving vital case information. Providing reassurance was really important and the support we've received has been fantastic."

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