

Transforming Process Efficiency: A Case Study

Introduction:

Capital Square, a real estate investment and management company that sponsors tax-deferred real estate exchange programs, faced significant challenges with process inefficiencies, where items would often break down, become inefficient, or remain incomplete as they transitioned between teams. They found that when work moved from team to team within the company, they were focused on their required results rather than optimizing towards outcomes for the customer. Additionally, company silos prevented technology transfer and integration across departments, thus adding to quality and efficiency issues.

Challenge:

Initially believing it to be a training deficiency, top executives contacted PM-ProLearn to provide project management training to make their teams more efficient and able to handle the increasing work load. In their assessment, the primary issue appeared to be a process problem, leading to delays and inefficiencies that affected the following stages of their workflow. This included work moving between functional areas with different technology systems or insufficient system privileges between teams. This, along with team members in various locations and time zones, delayed work and added steps to an already burdened process.

Discovery:

PM-ProLearn conducted comprehensive qualitative and quantitative assessment, including surveys based on a hybrid approach of several team assessment models. In reviewing the outcomes of the qualitative surveys, we identified an underlying cultural issue: team members did not connect their work with the organization's mission and personal motivations. We worked to ensure team alignment both at the top, and employee level to recognize and address the problem.

Solution:

We provided a detailed assessment with recommendations across the team to include structural changes, as well as provided training and coaching for executives to help improve overall work flow and internal communications. Tailored training programs, awareness initiatives, and process improvement measures helped foster a collaborative and efficient workflow while increasing corporate communication and culture.

**Results:**

Over time, the customer observed marked improvements in process efficiency, team collaboration, and overall productivity. Internal communications improved overall company culture and ensured alignment of executive team goals with employee actions.

Conclusion:

Customer was highly satisfied with our work, and applied recommended changes, leading to lasting efficiencies and improvements. This case demonstrates how addressing both process and cultural issues can lead to substantial benefits, offering valuable insights for potential clients.

“Working with PM ProLearn has been a game-changer for our organization. Their deep knowledge of business processes, employee management, and process evaluation was evident from the start. They took the time to understand our unique needs and challenges, providing insights that were both valuable and actionable.

The professionalism of the PM ProLearn team is unmatched. They delivered a comprehensive analysis and training with their findings and change suggestions in record time, allowing us to implement improvements quickly. Their ability to turn around high-quality work so efficiently was truly impressive.

We highly recommend PM ProLearn to any organization looking for a knowledgeable, professional, and responsive partner. Their expertise and dedication to our success have made a significant impact on our business.”

Jeff Blount

Chief Technology Officer