

CASE STUDY 5: THE BRANCH THAT KEEPS MISSING ITS RENEWALS DEADLINE

At an NSIA branch, renewal notices keep going out late, and a stream of customers lapse each month as a result. Every month the branch manager pushes the team to work late and clear the backlog, and every month the backlog returns. The manager has come to see late renewals as simply the nature of a busy branch and treats each month's rush as unavoidable.

When a regional colleague sits with the team and asks why the notices go out late, a different picture emerges. The renewal list is pulled manually and late; one officer holds all the customer contact details in a personal file; and underwriting queries on renewing policies are raised only at the last minute. The late notices are not the problem. They are the symptom of three fixable causes that no one had stepped back to examine, because everyone was too busy firefighting the symptom.

Discussion Questions

1. Write an evidence-based problem statement free of any solution.
2. Using the problem-solving cycle, what are the likely root causes behind the late notices.
3. How would involving the team produce a better solution and more ownership?

