


Where the issues are hiding in your rates processes (AND HOW TO FIX THEM)


THE ISSUES

Email-based processes

With hundreds of emails being sent and received, requests can easily get lost or accidentally deleted. Not to mention the double handling of requests or the approval delays that can occur due to backlogs and endless searching through email threads.



KEY QUESTION TO ASK YOURSELF: IF A RATES REQUEST GOES MISSING IN AN INBOX, WOULD YOU REALISE IT WITHOUT THE CUSTOMER FOLLOWING UP?



KEY QUESTION TO ASK YOURSELF: CAN YOU EASILY UNDERSTAND WHERE A PROCESS IS AT WITHOUT CONTACTING SOMEONE ELSE?

Transparency for ratepayers, employees, and auditors

Manually finding out where a process is at for ratepayers, other staff members or auditors can be time-consuming, especially when all your records of communications and actions are trapped in email threads, PDF forms and notes in various systems.


With automation, some organisations are seeing their auditing time dropping down from being a 5-day undertaking to a 1-day project.

Emails to solicitors

Managing communications with solicitors can be messy. Without standardised processes and requirements, email often leads to missing attachments, missing information and slower turnarounds.

Automating your rates processes doesn't just simplify work for your rates team, it also provides solicitors with clearer guidelines and requirements.

KEY QUESTION TO ASK YOURSELF: HAVE YOU EVER RECEIVED A REQUEST FROM A SOLICITOR THAT WAS MISSING INFORMATION?



KEY QUESTION TO ASK YOURSELF: HOW DO YOU KNOW THAT A REQUEST HAS BEEN APPROVED?



Approvals, approvals, approvals

With a significant number of requests being processed manually every week, it's no wonder rates teams can struggle with understanding whether a request has been approved.

If it's a paper signoff, the approval could be sitting on a desk or filed away somewhere. If it's an email it can quickly become buried amongst the hundred or so emails we receive on average daily.

Cross-department visibility

With many rates teams, once a request has been handed off to another team there can be a big gap in visibility.

If a customer wants an update, the rates or customer service team has to contact the relevant department, wait for a response, then inform the customer. Not a great customer experience.

KEY QUESTION TO ASK YOURSELF: HOW ARE YOU COMMUNICATING PROGRESS UPDATES TO YOUR RATEPAYERS?



KEY QUESTION TO ASK YOURSELF: HOW OFTEN DO YOU MISS STEPS WHEN PROCESSING RATES REQUESTS?

Missing key steps

With rates processes, if a key step is missed it can have a ripple effect on the entire process. Automating these processes ensures that no steps are missed and that every request is completed the same way every single time.

Automation can work like a digital checklist in this regard—ensuring you've completed every step along the way.

"Most of the processes in rates are like a drop of water in a pond. If you forget just one little thing, the ripples in the pond expand and can be huge. Rates is extremely detail oriented." **Kristen Scoble, Senior Rates Officer - Upper Hutt City Council**



THE FIXES

Automate interactions

Use automated emails to keep everyone in the loop without requiring any manual updates.

At specific steps in the process, you can build in automated emails to ratepayers, solicitors, and other key stakeholders. These emails can be used to keep them updated or prompt action.

This is especially helpful to customers, keeping them informed about the status of their request and reducing their need to call or follow up.

“Flowingly acts as a pre-flight checklist for our complex rates processes. It’s there to make sure our often-over-stressed human brains don’t forget something.” **Kristen Scoble, Senior Rates Officer – Upper Hutt City Council**



Build your pre-flight checklist

In the early days of planes, pilots struggled to remember everything they needed to do and often made disastrous mistakes. The solution they came up with was the pre-flight checklist. Something simple that made a huge difference.

With automation, you can ensure you’re never missing any steps, giving you complete end-to-end visibility over every request that comes through.

Use simple workflows

Workflows ensure all requests are kept in a single place and are automatically routed to the correct approver. If the work isn’t finished in the time expected, the Flow will send a reminder out.

Once complete, each flow comes with its own complete digital history, which shows the who, what, and when at a glance. Great for auditors, but more importantly great for your rates team.

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