

HICD FORWARD IN PRACTICE

When the Technology Works but the Institution Does Not Change

An institutional case study showing how workflow, ownership, user behavior, leadership, data, capability, and learning converted a functioning platform into measurable service value.

Resource type	Institutional Case Study
Intended users	Institutional leaders, digital teams, technology partners, transformation teams, and OD practitioners
HICD Forward movement	All four movements
Related pillars	Performance, Human Architecture, Workflow, Alignment, Capability, Leadership, and Learning
Estimated use time	10 minutes

WHY THIS CASE MATTERS

Technology creates value only when the operating conditions around it change. Installation, access, and training do not by themselves improve workflow, decisions, service, or institutional performance.

The Case at a Glance

A large service organization introduced a digital case management platform with automated workflow, dashboards, document management, and an AI supported classification feature. The platform passed technical testing, and more than 90 percent of employees completed training. Six months later, many teams still relied on email, spreadsheets, and paper notes. Managers asked for both old reports and new system updates, data quality remained uneven, and case performance had barely changed.

Leaders initially believed employees needed more training and a stronger directive to use the platform. The HICD Forward lens reframed the challenge as an institutional performance problem. The organization needed to align the actual workflow, process ownership, management behavior, data governance, capability, trust, and learning around the technology.

The Operating Context

The platform was intended to improve response speed, reduce manual work, strengthen data quality, and support better decisions. It had been configured around the documented process, but that process did not reflect how staff handled exceptions, coordinated informally, resolved customer issues, or obtained approvals in real work.

A Successful Launch Without Performance Value

Employees entered some information in the platform while continuing to manage work through familiar tools. Managers requested legacy spreadsheets because they did not trust the dashboard. Technology staff owned the system, but no operational leader owned the complete case process. User feedback arrived as separate support tickets and did not produce systematic workflow or policy changes.

What Leaders Initially Assumed

The technology provider believed low adoption resulted from insufficient user confidence and recommended more training. Senior leaders considered making platform use mandatory. These actions might increase login and entry rates, but they would not remove duplicate reporting, poor workflow fit, unclear ownership, weak data standards, or management routines that still depended on the old system.

KEY INSIGHT

The platform was technically operational, but the institution had not changed the conditions that made the technology useful, trusted, and necessary in daily work.

What This Meant in Practice

The work began by agreeing on the result that mattered: faster, more reliable, higher quality, and more transparent case resolution. This moved the conversation beyond system use and toward complete digital handling, first contact resolution, usable data, reduction of manual work, and better management decisions.

The Visible Performance Problem

Six months after launch, the baseline showed that technical implementation had not yet produced operating value. Six measures defined the starting point.

42 PERCENT

Eligible cases managed completely within the platform.

73 PERCENT

Teams maintaining separate spreadsheets or manual trackers.

61 PERCENT

Active cases containing complete and usable data.

16 DAYS

Average case resolution time after implementation.

54 PERCENT

Cases resolved during the first customer contact.

38 PERCENT

Employees who believed the platform supported their work.

CENTRAL MESSAGE

The technology worked, but workflow, ownership, management behavior, capability, data, trust, and learning still supported the old operating model.

What the HICD Forward Lens Revealed

The diagnosis focused on the conditions most likely to explain the performance gap. The pillars were used as one connected lens, not as separate assessments.

WORKFLOW

The platform followed the documented process rather than the real one. Informal coordination, exceptions, approvals, and workarounds had not been designed into the system.

HUMAN ARCHITECTURE

Employees were told to use the platform while managers continued requesting legacy reports. Staff received conflicting signals about which system actually mattered.

ALIGNMENT

Ownership of process policy, data quality, configuration, user support, and performance reporting was unclear. Technology owned the platform, but no one owned the full service outcome.

LEADERSHIP

Leaders reviewed logins and training completion rather than case outcomes. Their questions reinforced implementation activity without testing whether service performance improved.

Additional Conditions

- **Capability:** Employees had attended training but many had not practiced realistic normal, complex, and exceptional cases. Managers had little support in using the dashboard to lead performance.
- **Performance:** Adoption was measured through access and activity rather than complete digital handling, cycle time, first contact resolution, data quality, and reduction of manual work.
- **Learning:** User feedback became separate support tickets. No routine connected common problems to workflow, configuration, policy, guidance, or review of automated decisions.
- **Performance and value:** Leaders agreed that success would be judged through faster resolution, better first contact outcomes, trusted data, fewer workarounds, stronger manager use, and reduced cost.

DIAGNOSTIC CONCLUSION

The visible adoption problem was being produced by poor workflow fit, conflicting expectations, unclear ownership, limited case based capability, activity measures, and weak routines for learning and adjustment.

The Coordinated Response

The organization paused wider expansion and designed one connected adoption and value package. Each action addressed a condition found in the diagnosis and generated evidence for adjustment.

Intervention component	What changed	Implementation evidence
Real workflow design	Three service teams mapped actual case movement, simplified unnecessary steps, and reconfigured the platform around real work.	Cycle time, exceptions, workarounds, rework, and complete digital handling.
Ownership and governance	One operational owner was named, with clear roles for data, configuration, policy, support, and performance reporting.	Decision time, data issues, change requests, ownership gaps, and service results.
Manager routines	Legacy reports were removed for pilot teams and managers used the official dashboard in weekly reviews.	Dashboard use, decisions, barriers removed, and repeated issues.
Case based capability	Employees practiced normal, complex, and exceptional cases while managers learned to interpret performance signals.	Observed task performance, confidence, errors, and coaching needs.
AI oversight	Staff received clear rules for accepting, questioning, or overriding classifications, and errors were reviewed systematically.	Classification accuracy, overrides, risk patterns, and rule adjustments.
Pilot and learning	The pilot ran for twelve weeks with evidence reviews and adjustments every two weeks before wider implementation.	User feedback, configuration changes, workflow results, and scale decision.

Measurable Outcomes

Nine months after the revised implementation, the organization recorded improvement across adoption, service performance, data quality, management use, employee confidence, and operating cost.

What Changed

- The platform reflected how cases actually moved, including exceptions, approvals, customer contact, and operational decisions.
- Employees and managers received one clear signal about which system governed work, performance review, and data.
- User evidence, automated decision errors, and service results were reviewed together to guide regular workflow and configuration changes.

How to Interpret the Results

- The results came from changing the operating environment around the platform, not from increasing training or enforcing login alone.
- The focused pilot allowed the organization to correct workflow, governance, guidance, and configuration before wider expansion.
- Combining adoption signals with performance measures prevented system activity from being mistaken for institutional value.

Before and After

The figures below demonstrate the scale and range of results that a connected institutional response could reasonably target.

Performance measure	Before	After 9 months
Cases completed within the platform	42 percent	86 percent
Cases with complete usable data	61 percent	91 percent
Average case resolution time	16 days	9 days
First contact resolution	54 percent	78 percent
Manager use of the official dashboard	29 percent	84 percent
AI classification accuracy	68 percent	87 percent
Employee confidence in the platform	38 percent	74 percent
Estimated annual operating savings	Not quantified	\$1.6 million

What This Case Demonstrates

The organization did not need a stronger technology mandate alone. It needed an operating environment in which the platform fit real work, ownership was clear, managers used the evidence, employees could handle realistic cases, and feedback produced regular adjustment. Technology created value when the institution changed with it.

HICD FORWARD CONNECTION

Movement 1 aligned leaders around the service performance gap rather than system use. Movement 2 revealed workflow fit, ownership, behavior, capability, data, leadership, and learning conditions. Movement 3 translated those findings into a focused adoption and value package. Movement 4 used pilot evidence, user feedback, AI review, dashboard signals, and service results to adjust and sustain the model.

Questions for Your Institution

- Is your technology configured around documented procedure or the workflow people actually use?
- Who owns the complete performance outcome beyond the technology platform itself?
- What signals do managers send through the reports, questions, and tools they continue to use?
- Which measures show whether adoption is creating service or operating value?

About This Case

This case study presents realistic institutional conditions, decisions, interventions, and illustrative outcomes. It demonstrates how the HICD Forward approach can be applied to a common technology and modernization performance challenge and is not presented as a verified account of a specific client engagement.

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