

Case Study 12:

Incapable of Escape

Background

Lee Chen is a Best Practices consultant for a large insurance company called Lifeco. Best Practices is the department that's charged with ensuring consistent, fair, and defensible application of the company's policies. This means that if one person makes a claim, then another person in the exact same situation working for a different firm or filing on a different day should get treated the same exact way. Consistency is important at Lifeco as insurance claims get processed by hundreds of different people at various locations. Furthermore, customers are typically well informed about their coverage policies and naturally suspicious that the insurance company is trying to get out of paying.

Lee has been working the same job for 10 years. He enjoys his work, especially how people from every department come to him to ask for his expertise. At first, that kind of responsibility was daunting, but after many years, Lee has accumulated a wealth of knowledge and experience that comes from having seen almost every case imaginable. Lee considers himself somewhat of an expert, but he recognizes that he can't answer every single question that may come up.

Current Situation

Lee hasn't had a decent vacation in at least five years because he's the only Best Practices consultant in Quebec, and thus the only one who speaks French fluently. Although he has colleagues in Ontario, the Prairies and the Maritimes, he usually has to take his laptop and cell phone with him on days off in case emergencies arise.

His girlfriend, Roxanne Tremblay, recently told him that she'd like to go to Machu Picchu for two weeks so they could see the ruins. Lee would love to go, especially because he is fascinated by Inca culture, but worries that work may not be able to function without him for two weeks. "I generally keep my work phone handy when I'm sick in bed. I can't imagine they'll let me leave for two weeks!" he said to his girlfriend. "You've got to find a way to offload some of this work to your colleagues or you'll never enjoy a healthy work/life balance," Roxanne retorted.

Realizing that she was right, Lee set out to convince his superiors that there should be an online resource on the internal website, or intranet, that contained most of the pertinent information. A little cursory digging led him to realizing that this resource is called a Wiki, and that many companies were using one to streamline their operations. "Most of what I do is to delve into my past experiences to know how to handle current issues," Lee reasoned with his co-worker. He knew there had to be a way to automate this process so that it's not so inefficient and reliant on one person.

The Task

Lee has realized that he has to write a formal report about the benefits of putting his wealth of experience online on the Lifeco intranet. He has done some research and found that this practice is standard in many other industries. He also realizes that writing this document from a personal perspective may make him sound self-centred.

Furthermore, many of Lee's colleagues have additional expertise that could contribute to making the Wiki great. Again, Lee realized that the bulk of the work may come to him, but he wanted to ensure that the practices were standard across the entire country, not just in one province. Lee reached out to his colleagues and one by one they agreed that this project was a great initiative that they would be happy to work on with him.

With the entire Best Practices team on board, Lee will still need to convince the manager, as well as the director and vice president. There are six other consultants in other areas of the country: one in British Columbia, one in Alberta, three in Ontario and one in Nova Scotia. Together, the seven of them should write a formal report about the benefits, feasibility, cost, and timeline of putting the Best Practices of Lifeco online. Lee knows that he'll never get to see Machu Picchu if he doesn't get this project off the ground and reclaim his personal life.

Activities and Discussion

1. How can Lee get his colleagues to help him? How should they divide up the work of this collaborative writing project?
2. What is a reasonable timeframe for writing this report? How important will the timeline be to management as they are reviewing the proposal?
3. Could this initiative be expanded to the other departments at Lifeco as well?
4. What type of persuasive appeal should Lee use in proposing the project to his manager(s)?