



Intelligent furlough planning and more: How one industrial services company pivoted in time of crisis with the help of automation and data tools

As some companies continue to fight for survival in the current business environment, project teams may find themselves revising schedules to accommodate furloughs and abbreviated timelines. On a recent engagement, a client had the fortunate experience of discovering that its recently acquired technology for managing billing operations could also be used to support more strategic and insightful furlough plans and manage a newly remote workforce.

With Protiviti's help, the industrial services company had begun to centralize its billing function and support it with automated workflow and data visualization when COVID-19 disrupted the project and its overall business operations. Pivoting to address the new situation, the company realized that its newly acquired business intelligence technology assets used to streamline billing could just as easily help it plan and manage furloughs. The company sought Protiviti's expertise in joining process analysis with technical skills to gather data, conduct process optimization and automate workflow with the goal of making furlough planning a scientific, rather than a rushed or haphazard, process.

Like many businesses impacted by the pandemic, the company adopted the furlough strategy in response to a reduction in cash flow. It opted to retain all employees, but rotate team members on and off furlough during the crisis period to manage the continuing work, while controlling costs. The company's immediate concern was how to monitor work progress and ensure tasks were being completed promptly by a workforce that had abruptly become remote. Also, the company was challenged by the need to maintain continuity with employees rotating on and off furlough. Ensuring that returning employees had the information available to perform immediately upon reentry was critical to the success of the furlough plan.

"Organizations have to leverage their data to solve ordinary and extraordinary challenges. Visualization tools can put a unique spotlight on opportunities that would otherwise go undiscovered."

— Gordon Braun, Managing Director
Protiviti

The data visualization tools proved to be ideal for monitoring the newly configured billing process, as it allowed managers to detect bottlenecks, adjust their operations as needed, and plan the furlough schedule in a way that would maximize revenue. Specifically, the managers were able to prioritize roles and activities that contributed most directly to building up short-term cash flow.

Workflow Automation and Data Visualization to the Rescue

Workflow automation and data visualization technologies provided the means to identify who was working on what at all times, how best to cover for furloughed employees in their absence, and how to speed up their reentry into the workforce upon return. In essence, workflow automation and data visualization provided the managers, who were themselves also subject to furloughs, easily accessible, graphical information needed to identify problems and to intervene rapidly.

At the same time, the new data visualization tools provided support for planning the furlough schedule in a way that would maximize revenue. The company focused on sales and transaction volume, prioritizing roles and activities that contributed most directly to building up short-term cash flow. In the process, management realized that certain daily tasks improved cash flow faster than others, and that the cost of the worker – an indicator frequently used when reducing or furloughing staff – had less to do with the bottom line than the value of the work performed. As such, furlough decisions were made based on the visualized daily cash flow made possible by the business intelligence technology. In addition, the company prioritized IT staff who enabled and supported the remote workforce.

Other Benefits Delivered

In addition to furlough planning, leaders at the company used the tools to closely monitor the newly configured billing processes. The data visualization tools proved ideal for this purpose, as it allowed managers to detect bottlenecks and adjust their operations as needed. For managers, process visualization provided assurance that work queues were visible and documentation was organized when employees were placed on furlough. For employees, the real-time information allowed them to track tasks and deadlines, which also helped to streamline back-office activities and minimized duplication of errors. Utilizing these tools resulted in a notable increase in the timeliness and accuracy of invoicing.

The company implemented the data visualization and workflow automation tools to streamline billing processes before it was affected by the pandemic. And, when the pandemic emerged, its leaders had the foresight to pivot quickly and deploy the investment to address the organization's challenges successfully.

Keys to Success

Harnessing the value of data that a company may have locked away in transaction processing requires not only data visualization technology but also specific expertise and skills to integrate this software and to model these processes. Both are required to define key performance indicators and extract meaningful insights from the data to enhance decision-making.

As more businesses look for ways to survive in today's challenging business climate, many will choose solutions that encompass data visualization and workflow automation. Our client implemented these technologies to streamline billing processes before it was affected by the pandemic, and its leadership had the foresight to pivot quickly and deploy the investment to address the organization's challenges successfully. As the company emerges out of the crisis, the same tools will help it plan for the gradual return of employees to the workplace, based on financial, safety and other criteria. By aiding critical decision-making in these uncertain times, the smart and versatile investment it made many months ago will continue to prove its worth.

Protiviti (www.protiviti.com) is a global consulting firm that delivers deep expertise, objective insights, a tailored approach and unparalleled collaboration to help leaders confidently face the future. Protiviti and our independent and locally owned Member Firms provide clients with consulting and managed solutions in finance, technology, operations, data, analytics, governance, risk and internal audit through our network of more than 85 offices in over 25 countries.

Named to the 2020 *Fortune* 100 Best Companies to Work For® list, Protiviti has served more than 60 percent of *Fortune* 1000 and 35 percent of *Fortune* Global 500 companies. The firm also works with smaller, growing companies, including those looking to go public, as well as with government agencies. Protiviti is a wholly owned subsidiary of Robert Half (NYSE: RHI). Founded in 1948, Robert Half is a member of the S&P 500 index.