

Operating Model Change Brief

From Functional Hand-offs to End-to-End Case Ownership

Synthetic portfolio case study | Business analysis and change design | August 2026

Purpose

This brief proposes a 90-day operating-model pilot for a service organisation experiencing delayed customer resolution, repeated hand-offs and inconsistent management information. It defines the target outcome, decision rights, process controls, measures and adoption plan without assuming that a technology purchase will solve the underlying ownership problem.

Recommendation

Create one named case owner from acceptance to closure, supported by a cross-functional triage rhythm and a single set of status definitions. Pilot the model in one region for 90 days before changing organisational structure or buying new workflow software.

The proposal is deliberately narrow. It changes ownership, decision rights and management routines first. Existing systems are used during the pilot with a controlled reporting layer. A later technology decision should be based on evidence from the new process rather than on vendor demonstrations.

Current-state problem

Customer work enters through email, telephone, account teams and a central service desk. Each function maintains its own queue and applies different definitions for urgent, waiting and resolved. Work is transferred when it crosses a team boundary, but ownership of the customer outcome is not transferred clearly. This creates four visible symptoms:

- Customers repeat information after each hand-off.
- Managers see queue counts but cannot distinguish active work from waiting time.
- Priority is renegotiated informally, often by escalation rather than agreed rules.
- Root causes remain hidden because closure codes are incomplete and inconsistent.

The problem is not simply slow processing. It is the absence of one accountable owner, one clock and one auditable decision path.

Design principles

- One customer outcome has one named owner at any point in time.
- Specialist teams own technical decisions; the case owner owns progress and communication.
- Status must describe what is happening, not which team currently holds the item.
- Priority is determined by impact, commitment and risk using visible rules.
- Waiting time is measured separately from productive handling time.
- No case is closed without a resolution code, customer confirmation or documented exception.
- Management information is derived from operational events rather than manual summary slides.

Target operating model

Entry and acceptance

All channels create a single case record with a minimum dataset: customer, service, issue, impact, commitment, contact preference and evidence. The service desk performs a five-minute completeness check. Incomplete work is returned immediately with the missing field stated; complete work receives a case owner and priority.

Ownership

The case owner remains accountable until closure, even when engineering, finance, suppliers or account management must contribute. Specialists accept tasks within the case rather than receiving the whole customer problem. Ownership can transfer only when both the outgoing and incoming owner record the reason and next commitment.

Triage

A 15-minute cross-functional triage occurs each working day. It reviews new high-impact work, blocked cases, overdue commitments and cases requiring a risk decision. Routine work is not discussed. The meeting is a decision forum, not a status-readout.

Resolution and closure

The case owner confirms that the service outcome is delivered, records the root cause and communicates the result. Closure requires one of four conditions: customer confirmation; expiry of a documented response period; acceptance by the account owner; or an approved exception. Reopened cases retain their original identity.

Decision rights

The operating model separates accountability from technical authority:

- Service Desk Lead: owns intake standards and queue health.
- Case Owner: owns progress, next action, customer communication and closure evidence.
- Technical Specialist: owns diagnosis and technical recommendation.
- Account Owner: decides commercial concessions within delegated limits.
- Duty Manager: decides priority conflicts and exceptions.
- Process Owner: owns definitions, controls, performance review and continuous improvement.
- Data Owner: owns required fields, event quality and reporting reconciliation.

The duty manager can override priority but must record the reason. The case owner can request specialist support but cannot overrule a safety, legal or technical control. Commercial concessions above delegation remain with the account owner or finance approver.

Minimum process controls

- Unique case ID across all channels.
- Mandatory impact, commitment and owner fields before acceptance.
- Time-stamped status changes and ownership transfers.
- No "waiting" status without a named dependency and follow-up date.
- Automated alert when a customer commitment is within four hours of breach.

- Weekly review of reopened, aged and manually reprioritised cases.
- Monthly reconciliation between operational cases and invoiced service activity.
- Role-based access for customer, commercial and employee information.

Status and priority definitions

The pilot should use six operational statuses: New, Active, Waiting on Customer, Waiting on Internal Dependency, Resolution Confirmed and Closed. Team names must not appear as statuses.

Priority is based on a four-factor rule:

- Impact: safety, service loss, financial exposure and number of users affected.
- Commitment: contractual response, customer promise or regulatory deadline.
- Time sensitivity: deterioration risk if action is delayed.
- Workaround: whether the customer can continue safely and acceptably.

Priority 1 requires immediate ownership and 30-minute communication. Priority 2 requires ownership within two hours. Priorities 3 and 4 enter planned queues with a visible commitment date.

Data and reporting requirements

The pilot does not need a new platform, but it does need a controlled event model. Each case must record created, accepted, assigned, status-changed, commitment-set, task-completed, resolution-confirmed, closed and reopened events.

The management view should contain:

- Open cases by priority, age and owner.
- Customer commitment at risk within the next working day.
- Active handling time versus waiting time.
- First-time resolution and reopened-case rate.
- Ownership transfers per case.
- Root-cause completeness.
- Customer update compliance.
- Backlog movement: opened, closed and net change.

Queue size alone is not a success measure. A smaller queue can hide premature closure, while a larger queue can reflect improved capture. Measures must be reviewed together.

90-day pilot plan

Days 1-15: discovery and baseline

- Observe work across all entry channels.
- Sample 100 completed and 100 open cases.
- Agree definitions and document current decision rights.
- Establish baseline cycle time, waiting time, hand-offs and reopening.
- Select one region with representative demand and committed leadership.

Days 16-30: configure and rehearse

- Create the minimum case template and status model.
- Train case owners and duty managers using real historic scenarios.
- Test priority decisions and ownership transfers in tabletop sessions.
- Publish customer-communication expectations.
- Complete privacy, access and retention review.

Days 31-75: live pilot

- Route all selected-region work through the new model.
- Hold daily exception triage and twice-weekly coaching.
- Review data quality and blocked work every week.
- Do not expand scope during the first four weeks.
- Record all process workarounds and system limitations.

Days 76-90: evaluate and decide

- Compare pilot outcomes with baseline and a non-pilot region.
- Interview case owners, specialists and a sample of customers.
- Quantify workload shifts and unresolved control gaps.
- Decide whether to scale, revise once or stop.
- Translate proven requirements into any later technology selection.

Pilot success criteria

- Median end-to-end resolution time reduced by at least 20% without increasing reopened cases.
- Customer commitments met in at least 92% of cases.
- Average ownership transfers reduced by at least 30%.
- Root-cause and closure evidence complete in at least 95% of cases.
- Staff report that decision rights are clear in at least 80% of the pulse survey.
- No material privacy, safety or financial-control failure.

Change and adoption approach

The change should be framed around reducing avoidable effort, not monitoring individuals. Performance coaching uses case patterns and process obstacles before individual productivity. Team leaders receive a weekly adoption view showing completeness, exceptions and coaching needs.

Two local champions should support case owners during the pilot, but they should not become a parallel help desk. Questions, decisions and workarounds must be logged so the process owner can update guidance once, visibly.

The process owner should publish a short "you said, we changed" note every two weeks. This creates evidence that feedback changes the design and reduces the risk that staff create shadow processes.

Risks and mitigations

Case owners become coordinators without authority

Mitigation: publish decision rights and escalation service levels; review blocked cases in daily triage.

Specialists resist task-based contribution

Mitigation: preserve technical authority, define task acceptance rules and monitor unplanned interruption.

Reporting becomes an additional manual burden

Mitigation: capture event timestamps in the working process; prohibit duplicate spreadsheet summaries during the pilot.

Priority inflation continues

Mitigation: audit overrides weekly and require impact evidence for Priority 1 and 2.

Early performance falls during learning

Mitigation: use a two-week stabilisation window and compare trends, not one-day results.

Final decision

Approve the 90-day pilot with one regional process owner, named case owners and the success criteria above. Defer structural reorganisation and software procurement until the pilot demonstrates which controls and capabilities materially improve customer outcomes.

Limitations

This is a synthetic writing sample. A live operating-model design would require process observation, employee consultation, customer evidence, technology constraints, data-protection assessment and service-specific regulatory review.