

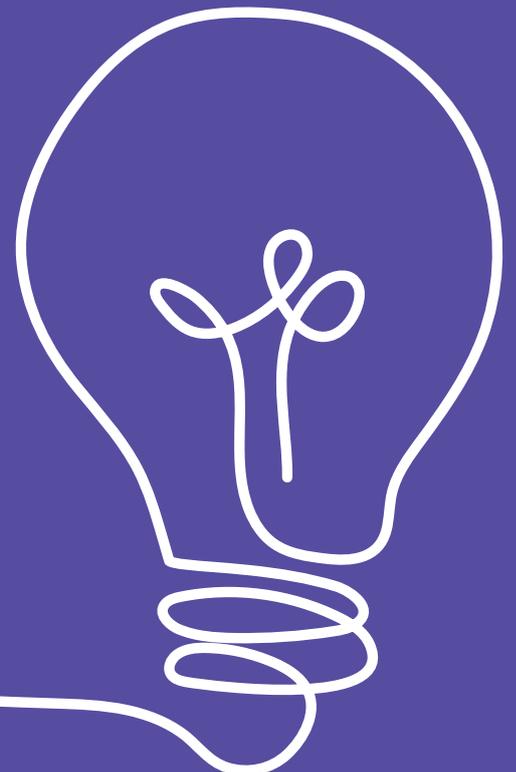
# N3



## A LEANER AND FOCUSED FINANCE ALWAYS LOOKING UPWARD AND BEYOND

CENTRAL AND NORTH WEST LONDON NHS FOUNDATION TRUST

LONDON, MENTAL HEALTH



FOR INFORMATION ON THE  
INNOVATION PROGRAMME  
[CLICK HERE](#)

# THE INNOVATORS

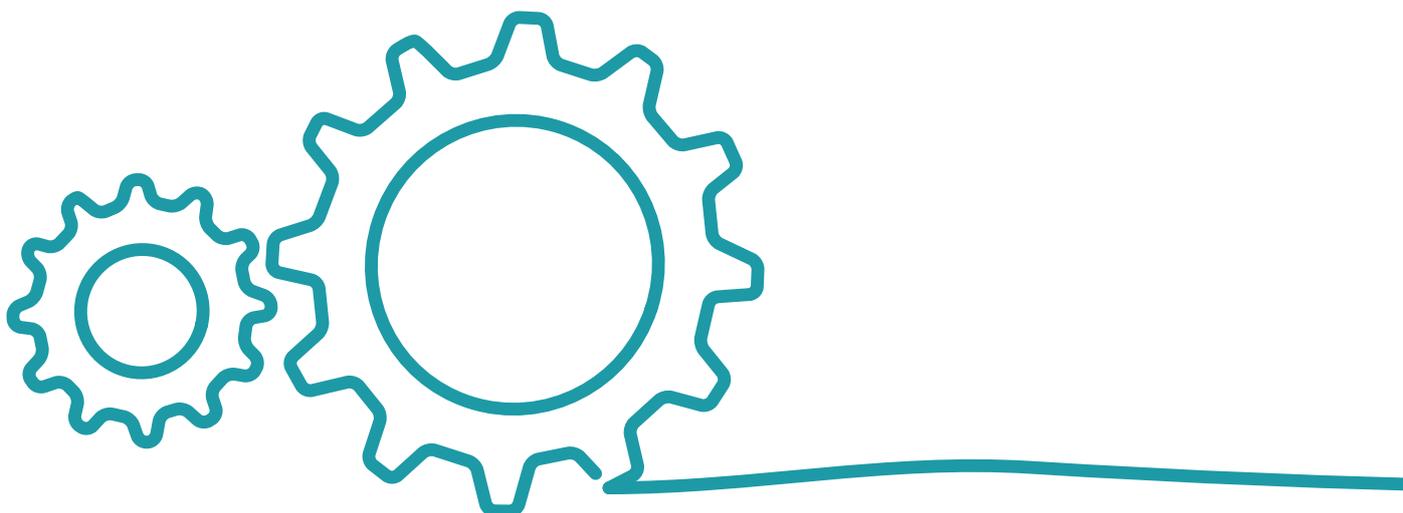
Pru Patel, transaction services team and in particular Reena Dhunday and Justina King, faster closure team and senior manager leads.

## THE PROBLEM

We needed a way to redesign, rethink and obtain engagement from our staff to drive efficiency and process improvement. Otherwise we were in danger of continuing to focus on details and not concentrate on the bigger picture. Given the constant deadlines and challenges thrown at us by the centre, including working through multiple planning rounds, the governance regime changing from the FT monitoring regime, working across the three integrated care systems which the trust operates in and not to mention the Covid-19 related financial challenges.

## THE CHALLENGES

- **How might we create the efficiencies and provide the motivation to the department to always strive for more so that we could achieve our ambition of working smarter and leaner and gain satisfaction in every job being well done?**
- **How might we rise to the challenge of faster closure so that we could meet the challenging deadlines?**
- **How might we embrace better ways of working so that we have a culture of continuous improvement across the finance department?**



# THE INNOVATION

We reinforced the finance process improvement agenda across finance, showcasing achievements to motivate and encourage staff to explore new ways of working. We set up the faster closure group to address the blockages that were preventing us from achieving the efficiencies that we knew would lead to bigger and better ways of working. By centralising various tasks, developing consistent methodologies and fresh ways of thinking, the team were re-energised. Staff motivation, as well as training and development were key to everything we did and this manifested in staff embracing the challenges and excelling as we had never seen before.

In particular, the 'seen but not heard' and often overshadowed transaction team surprised us all by producing our first very own home bred bot developer!

We restructured the department so that we could introduce the process improvement project team which worked across and in conjunction with the finance team to tease out inefficiencies and

reduce silo working, unblocking pipelines that were preventing us from working together.

We provided training which not only included our own processes but also on automation. This proved very effective in working across the teams.

We worked in conjunction with our external stakeholders including NHS England and NHS Shared Business Services to develop our processes and reporting. The introduction of automation and bespoke designing of reports opened up areas of better working that we had toyed with previously but never embraced.

We represent finance on the trust robotic process automation (RPA) steering group to ensure we could get economies of scale and tap in on the expertise and technical IT knowledge, while showcasing our achievements for others to learn from.

# THE LESSONS LEARNT

- We learnt how to create bots to make our processes efficient by engaging with NHS England and learning/ self teaching.
- We introduced the culture of continuous improvement through various channels and regular finance wide meetings.
- We encouraged staff to self-develop through lateral thinking and have the confidence to drive their own improvements forward.
- We showcased our emerging talents at various forums to provide motivation and learning.
- We worked with external providers by exploring new ways to do things outside of our expertise.

## THE OUTPUTS

- robotic processes were introduced
- transactional teams became engaged
- automation training was provided
- automated debt board reports created with the engagement with our shared service provider
- a faster closure project was established
- bad debt journal created from automated report downloads
- agency staff accruals automated from shifts
- central journals including GRNI, prepayments and drugs introduced
- centralised income billing introduced for purposes of control and standardisation of processes
- ready to pay files templates for upload to the finance system- Oracle- automated
- self-billing agency information collated and automated for payment
- standardisation of common processes and documents (e.g. property register across estates and finance)
- home bred talent emerged
- successful pilot with NHS England
- dedicated project managers in place working across finance to identify better ways of working.

## THE OUTCOMES

- Process improvement culture introduced across the whole of the finance department and having an impact across all areas. This included the introduction of robotics to the team following a successful pilot with NHS England.
- Staff engaged in process improvement as a result of seeing repetitive tasks being taken over by RPA processes.
- In-house, self-taught RPA developers have emerged, creating robots for a number of process including:
  - Downloads of reports from the ledger
  - Automated e-mails for standard processes including payment runs
  - Journals with attached backups prepared for authorisation
  - Automated chasing of Invoice authorisation for payment to budget holder workflows
- Self-belief that through RPA and process improvement faster close of month end can be achieved with the initial aim of reducing the time taken from 5 to 4 days.

- Finance department restructured with two finance process improvement project managers appointed to drive the agenda forward across all of the finance department. Their role includes:
  - building up governance arrangements around projects ensuring that we are in line with trust requirements and protocols
  - liaising with each of the divisions within finance to identify processes and tasks which can be redefined to provide maximum efficiency.
- Human errors minimised.
- Created valuable resource in terms of time for focusing on analysing and reporting as opposed to number crunching.
- Transactional team members have emerged as leaders in the automation agenda, providing much needed development opportunities to lead on various projects.
- Created a springboard for investment in wider benefits
- Development opportunities have opened up, especially for non-qualified finance staff leading to a sense of achievement.

## THE QUICK WINS

- Change the culture so that staff are not working in silos and are not dependent on other teams sorting their issues. Get staff engagement and enthusiasm from the start. Build a culture of staff interest in areas outside of their divisions. Showcase what others are doing and what is possible.
- Start small and build on your agenda. That way you can learn and apply the learning to develop more complex processes.
- Identify resources and support that staff can access to help them on their journey.
- Create a project group with representation from across the whole finance department and from all bandings.
- Keep your IG and IT departments in the loop with regards to meeting expectations.
- Be persistent and escalate, if necessary, where there are blocks in the process.
- Build relationships internally and externally. They will help you along your journey by unblocking areas outside your domain.
- Remember process improvement will not happen immediately. It will take considerable time, effort and patience. Be persistent and follow your goals through.

# THE REVIEWERS SAID

**“THIS ENABLES EARLY MONTH-END CLOSE BY STREAMLINING PROCESSES. THIS CAN BE REPLICATED ACROSS A NUMBER OF DEPARTMENTS AND HAS WIDER BENEFITS FOR ENHANCING SKILLS AND BUILDING CONFIDENCE.”**

**“THE INNOVATION HAS NOT JUST FOCUSED ON AUTOMATION BUT ACROSS THE WHOLE DEPARTMENT AND WILL BRING BENEFITS TO ALL FINANCIAL AREAS. ”**

**“I THINK THIS INNOVATION HAS A WIDE RANGE OF PROCESS CHANGES WHICH WILL BE HELPFUL TO OTHERS.”**



# WHAT YOU CAN DO NOW

## SUBMIT INNOVATION

**If you recognise the problem stated and have implemented your own innovation** to overcome it please submit this innovation to the programme and give others more examples to learn from.

## REGISTER INTEREST

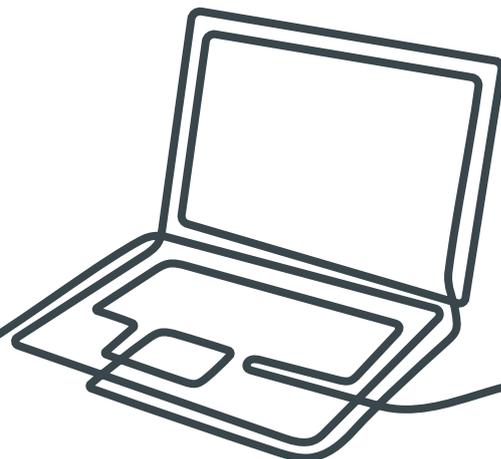
**If you recognise the problem stated and would like to know more details about this innovation in particular,** we will be hosting showcase and workshop sessions throughout the year, so all interested staff can gain ideas and inspiration from innovators in a manageable one-to-many format.

## SUBMIT PROBLEM

**If you have a problem but don't currently know of a solution to it,** then please submit it here and in 2022 the Forum intends to crowdsource solutions to problems that don't currently have known innovations.

## LEARN MORE

**If you would like to learn more about about the innovation programme** please click for more details.



## IN SEPTEMBER 2021 THE FORUM LAUNCHED...

- A national Innovation Programme for NHS Finance staff to submit their innovations for peer review. Successful innovations will be published and accessible to all on the One NHS Finance website
- A 'Software Skills For Finance Staff' event series taught by NHS Finance for NHS Finance including MS Excel, PowerBI, SQL etc.
- An 'Art of the Possible' briefing which explains two new technologies AI & Blockchain and discusses the opportunity for NHS Finance
- An Automation Group to review and improve the efficiency of existing national processes and returns

## WHAT YOU CAN DO NOW

- Submit your innovations for peer review
- Sign up to be an innovation peer reviewer
- Read Art of the Possible
- Sign up for Software Skills for Finance
- Register your interest in automation and all things innovative

### Innovation Programme



### Software Skills



### Automation sign up



### Be a peer reviewer



### Art of the Possible



## FURTHER INFORMATION

Website: [FinanceInnovation.nhs.uk](https://FinanceInnovation.nhs.uk)

Email: [FinanceInnovation@nhs.uk](mailto:FinanceInnovation@nhs.uk)

LinkedIn: [One NHS Finance](#)

Twitter: [@OneNHSFinance](#)



One NHS Finance brings together the Future-Focused Finance, National Finance Academy, and the Finance Innovation Forum programmes and networks to make sure that everyone working in NHS Finance has access to skills, knowledge, methods, and opportunities to influence and enhance patient services.



An NHS Finance platform for the discovery and development of problems, ideas and innovations.