



Business Process Analysis in Legal Aid: How Florida Rural Legal Services Partnered with Toyota to Improve Its Client Intake and Customer Service

Many organizations today have experience with business process analysis (BPA), a method to analyze a company's processes and improve the efficiency and effectiveness of its operations.

In fact, there are multiple methodologies used to accomplish the goals of BPA. A notable one is the Toyota Production System (TPS).

TPS was established based on several principles and concepts, including a customer-first culture, an acknowledgment that team members are the most important resource, continuous improvement, a go-and-see approach, jidoka, and just-in-time. Jidoka—loosely translated as “automation with a human touch”—means that when a problem occurs, the machine stops immediately, preventing defective products from being produced. Just-in-time means making only what is needed, when it's needed. Under this method, Toyota produces vehicles on an as-needed basis, based on the orders received through its dealers. By doing this, it's able to keep its inventory low while not spending excess labor and time on production.

Implementing TPS has enabled Toyota to quickly and efficiently make vehicles for consumers, save time, and eliminate waste. It's no wonder, then, that this method has been replicated elsewhere.

For 25 years, Toyota North America's nonprofit affiliate, the Toyota Production System Support Center, has shared the manufacturer's philosophy with organizations that have nothing to do with making cars. None of those had been legal aid organizations—until recently, when Toyota partnered with Florida Rural Legal Services.

Background

In April 2016, Toyota came to Florida Rural Legal Services (FRLS). One of its advisors sat by the reception desk in FRLS's Fort Myers office and took notes about the organization's workflow. He observed the amount of time spent on actual value-added activity by visualizing and then mapping out the processes. To do this, every action was tracked, from noting walk-in visits and hotline calls, to counting the receptionist's steps from the desk to the door, to watching case transfers. This would be part of Toyota's trademark business improvement method.

It's important to note that prior to FRLS's experience with Toyota and TPS, the program recognized the need to improve their intake system and applied for and received a Technology Initiative Grant (TIG) from the Legal Services Corporation in 2015. Through the grant, FRLS upgraded the software for its telephone system, added a hotline, and centralized its intake system.

But that upgrade wasn't enough. After making first contact with FRLS, there were times when clients had to wait for up to a week to be screened for services, and then even longer on occasion to be assigned to a legal advocate. This made the managers think about whether they could shorten the lag time, and whether the different intake being done in each of the program's four main offices could be made uniform.

Also, as FRLS would later learn through TPS, its intake process had several pitfalls:

- An assumption about what the problems were
- A process of trial and error until they reached a system that worked
- Not looking at data and measuring the gap between first contact and screening closely enough

These pitfalls made improving the program's intake take longer. It was also harder to explain the benefits of an improved system after the processes had been normalized.

Just by coincidence, around the same time that FRLS was rethinking its intake, Melissa Moss, deputy director for strategic initiatives at the Florida Bar Foundation, was looking for somewhere to pilot Toyota's business improvement strategies. She picked **FRLS** "because of the important safety-net role it plays in 13 South Central Florida counties." The final step was an in-person meeting between some representatives from Toyota and FRLS. Then the partnership was on.

Business Process Analysis in Practice

As part of TPS and following Toyota's example, FRLS adopted their eight-step problem-solving method:

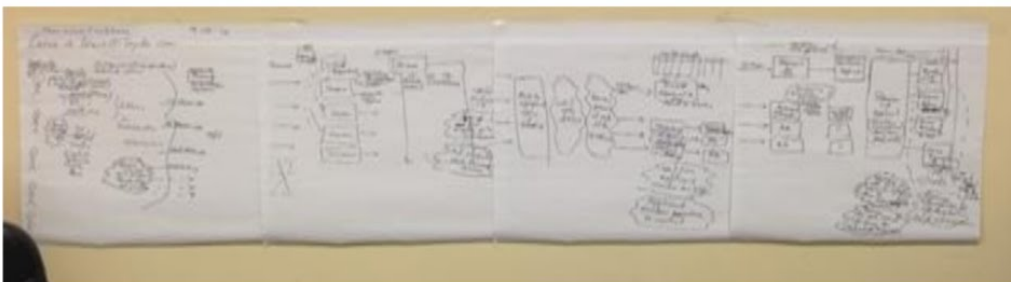
1. Clarify the problem
2. Break down the problem
3. Set a target
4. Analyze the root cause
5. Develop countermeasures
6. See countermeasures through
7. Evaluate both results and processes
8. Standardize successful processes

Clarifying the Problem

FRLS started with the first step—clarifying the problem—by mapping its current processes. (Note: The following images are taken from FRLS's presentation at LSC's 2018 Innovations in Technology Conference.)

What We Did

- Charted and made visible the current process
- Identified known problems or waste
- Go & See intake process (Receptionist, Screeners, Attorney)



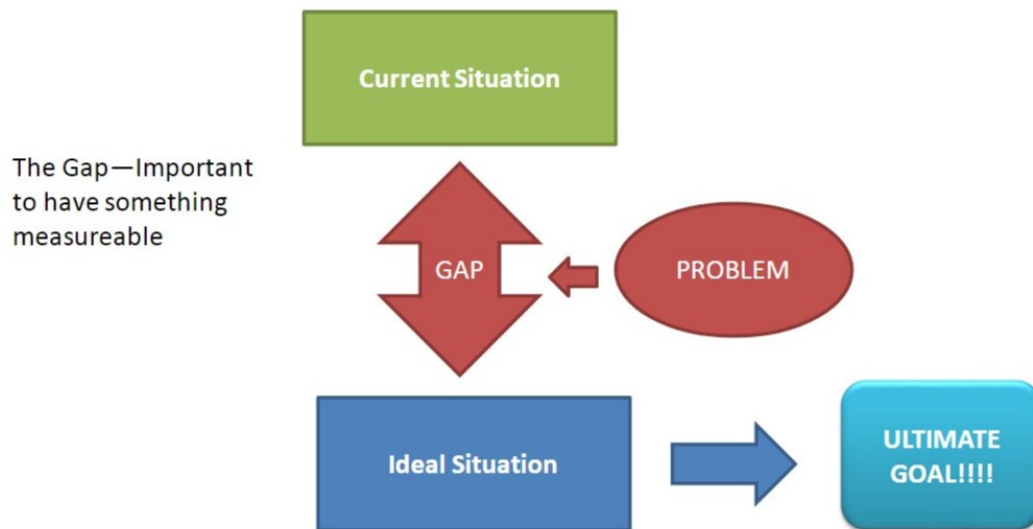
This step involved comparing the current condition of their processes with the ideal condition. The gap between the two conditions is the opportunity for improvement. Added up, small improvements over time result in large improvements.

**Initial Condition
(April 2016)**

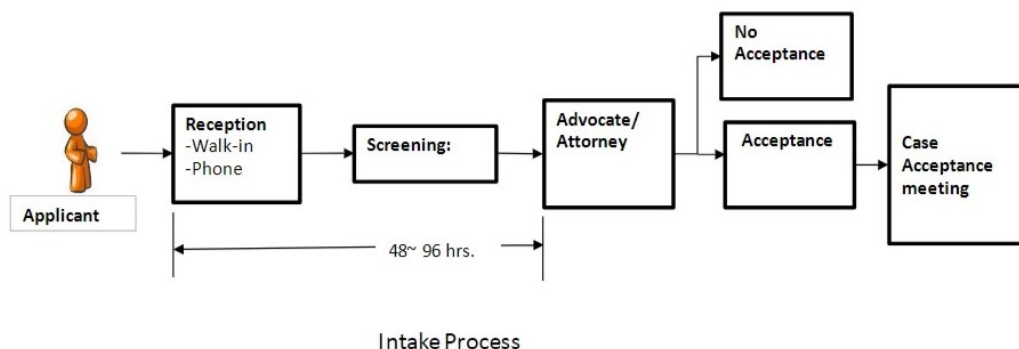
Ideal Condition

After this initial analysis, FRLS then broke down the

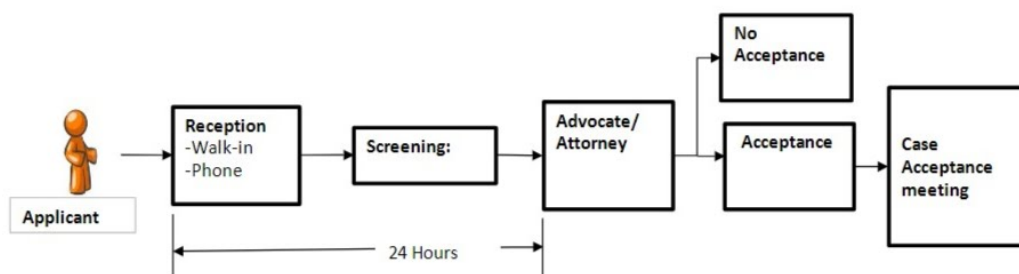
Clarify the Problem



- The focus of this project was to make our intake system more efficient to allow Applicants better access to our legal services and decrease burden on staff.



- Ideally we want to decrease the time between initial phone call to advocate assignment to less than 24 hours.



problem and set targets.

One of the general problems the program had been having, it realized, was a lack of standardization across its offices in the number of available appointments, the criteria being used, methods of screening, and the assignment of cases. Not only that, but they were being wasteful: FRLS had too many stops along the way, preventing its processes from adding value.

The program's targets then became:

- Reduce the lead time to less than 24 hours
- Increase the number of intakes by 10 percent

And, to go along with the targets, several countermeasures were taken and seen through:

- Centralize the intake (all intake specialists now screen for all offices)
- Create program-wide policies for case handling (advocate of the day and case screening policies)
- Check progress consistently
- Anticipate obstacles and figure out ways

Intake Process

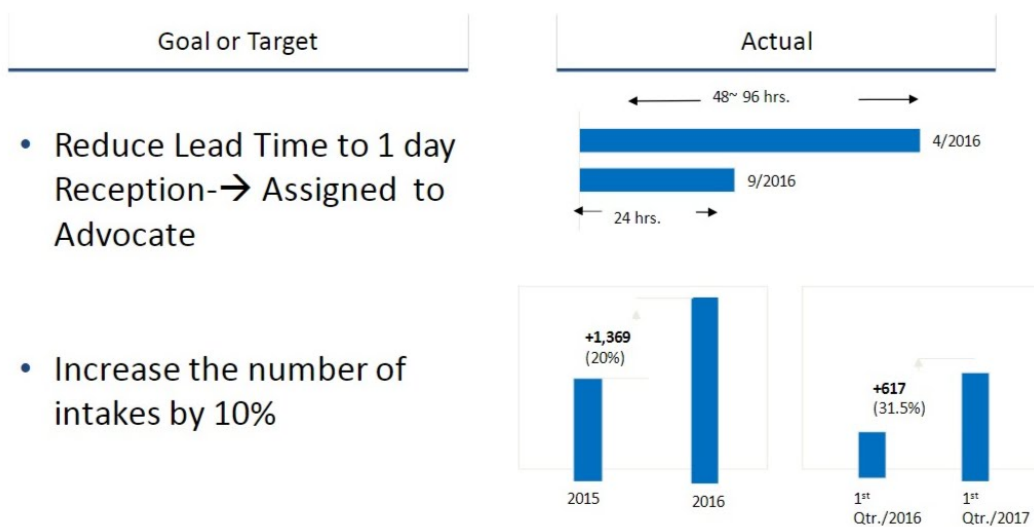
reporting, informing, and consulting

- Solve a problem for good and move on to the next one (the general idea)

With a plan for corrective action in place, FRLS began monitoring the results and measuring improvement. They looked at whether the target was achieved and documented the successful processes—a practice that helps sustain improvements.

Measuring Improvement

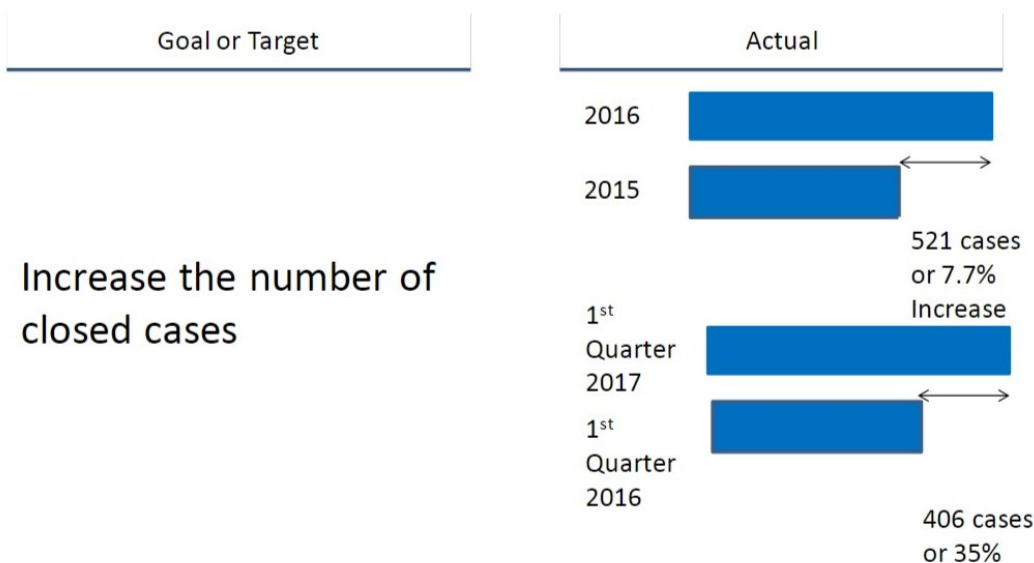
How we measured improvement:



As can be seen in the images above, following Toyota's model led to some positive changes in a short amount of time.

For example, the lead time, which was once multiple days on average, was now reduced to a day. Also, the number of intakes and closed cases both increased.

Other Improvement Areas



Increase

All intakes (including rejected and prescreens)

Closed cases

Year	Number of intakes	Year (first three quarters)	Total closed cases	Higher closing code closed cases
2016	12,567	2016	4,639	501
2017	15,157	2017	5,333	729

The TPS Effect

Before Florida Rural Legal Services got paired up with Toyota, it lacked the process uniformity that successful organizations such as Toyota covet—and practice—so much. Its offices were working in silos, with different intake being done in each one. Gaps and inefficiencies in the program’s workflow—which were invisible to the staff member or left unaddressed—were affecting the quality and quantity of services delivered to FRLS’ clients.

After implementing TPS, many things changed. The lead time has decreased, and the number of intakes and closed cases have increased. But the organization’s philosophy and culture have changed, too.

FRLS is now using business process analysis tools in intake, finance, and fundraising. They also talk about BPA in management meetings. And FRLS is changing the culture of its offices by adopting a client-first mindset, examining its process and workflows more closely, not jumping to solutions, tackling tough problems, and always asking “why.”

Among FRLS’ lessons learned:

- Change is hard, and management needs to be involved.
- Getting the right culture can take years, but it’s the difference between being good and being great. This comes from the top and affects everything.
- Involving staff in the learning process is very important. It should also be communicated that streamlining processes is to help them, not make them work harder.
- Utilizing the problem-solving method takes discipline, but it’s critical and saves time in the end. Sometimes it takes many attempts to get right, requiring patience and practice.
- Convincing people to problem-solve and be more reflective is a challenge in busy practices.

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