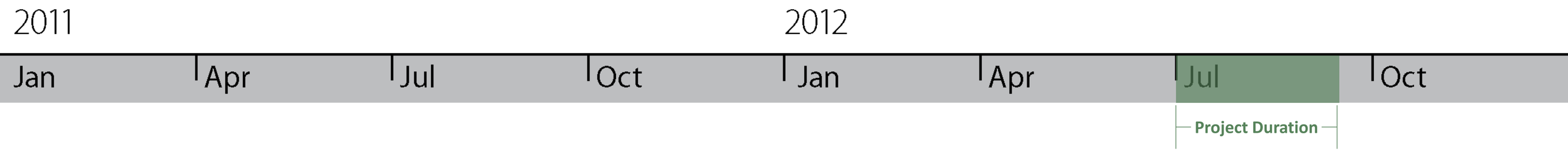
Project Results from Lean Efforts

Improved Invoicing for Annual Property Insurance Renewal

Department of Enterprise Services – Office of Risk Management



Problem

Billing process and invoice format confused customers, resulting in excessive inquiries and rework for all involved.

Causes

- Information needed by customers was not included on the invoice.
- Customers did not have access to the insurance schedule.
- Customer receives invoice months after insurance decisions are made.
- Lack of customer confidence in handling insurance decisions.

Solutions

- Improve invoice with needed information.
- Communicate about the invoice to prepare customers.
- Provide access to insurance schedules online.
- Provide FAQs online.

Results

- Decreased phone calls from estimated 810 in 2011, to 9 in 2012.
- Decreased emails from estimated 350 in 2011, to 7 in 2012.
- Overall savings in time rededicated to customer service and applying improvements to other insurance services.

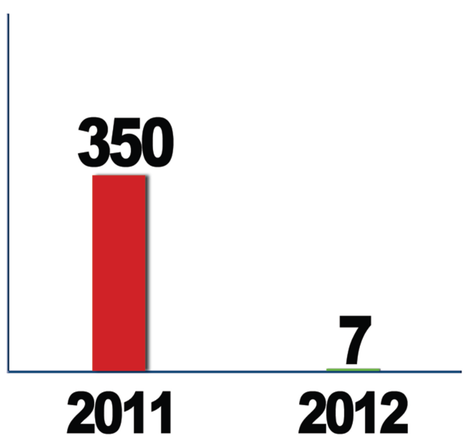
Next Steps

- Test online add/delete form, with required fields, to mistake-proof updating the insurance schedule.
- Develop online portal to provide customers access to property insurance information.
- Develop training modules for customers.

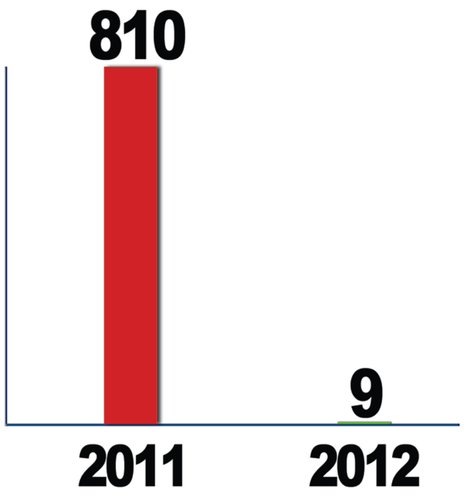
Washington State Department of Enterprise Services
Office of Risk Management

Risk Management Insurance Billing Improvement Process

Decrease in customer questions related to billing



Decrease in emails



Decrease in phone calls

Lean Methods Used:

Value Stream Mapping, Gemba Walk, Root Cause Analysis, Mistake-Proofing

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