

Strategic Lean Project Report



For Reporting Period: July 1, 2016 through December 31, 2016

I. General Information:

Lead agency name: Department of Retirement Systems

Partner agencies: WATECH

Improvement project title: Phone Tree Update

Date improvement project was initiated: 2/1/2016

Project type: New Project

Project is directly connected to:

Results Washington performance measure

Agency Strategic Plan

Other

If applicable, specify the alignment:

5 1.1

DRS Agency Key Goal – Elated Customers

DRS Outcome Measure – 01 Customer Satisfaction

Report reviewed and approved by: Tracy Guerin

II. Project Summary:

The Department of Retirement Systems improved customers' access to the agency by constructing a new phone tree. The new phone tree has reduced customers' time to get to a live person from an average of 1 minute 20 seconds to 45 seconds by going from up to four phone tree selections to reach a team member to one phone tree selection in most cases to reach a team member. The new phone tree has also reduced the number of callers opting out to the receptionist to be transferred to appropriate areas from 28% to 14%.

III. Project Details:

Identify the problem:

The existing phone tree took callers up to four phone tree selections and up to 1 minute and 30 seconds before the caller was speaking to a live person. Wording and/or acronyms left callers confused as to what to select; therefore, 28% of callers would opt out of the phone tree to the receptionists, who would then transfer the caller to the appropriate division. Customer satisfaction interviews indicated customers were confused with selections on the phone tree.

Problem statement:

Currently, DRS customers have to select up to four phone tree options to speak to a team member compared to our target of one selection, which we want to reach by 10/31/2016.

Improvement description:

A nine-person DRS project team worked with a team member from WATECH to build a new phone tree. The main DRS message was shortened, additional "on hold" messaging was added and the phone tree hierarchy was reduced from four or more

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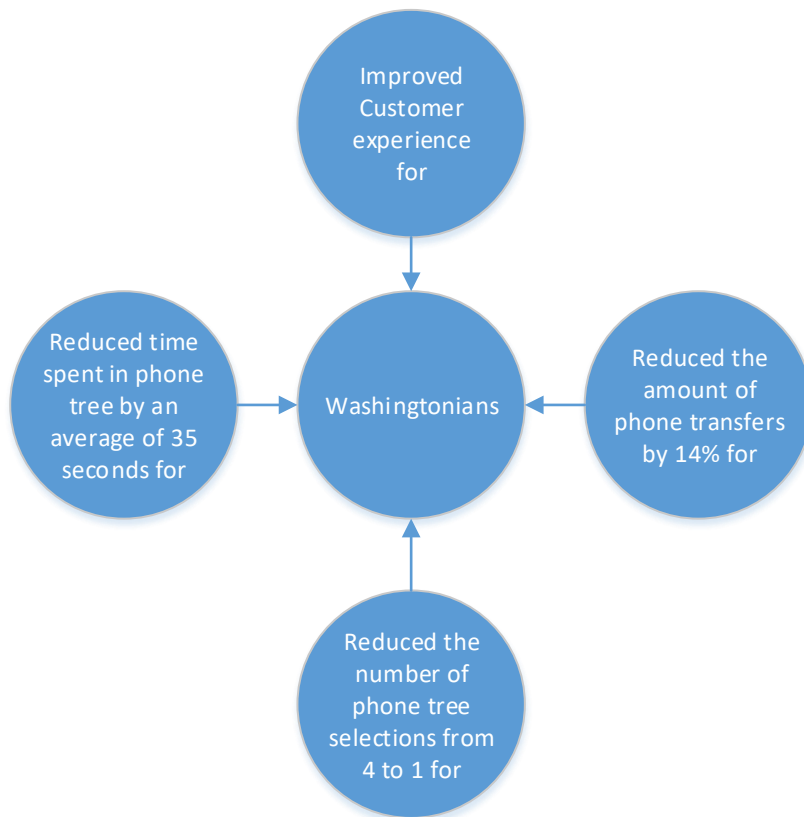


levels to one level in most cases. The project team reviewed customer feedback and collaborated with the DRS Communications Team to plain talk the phone tree options to lessen customer confusion. The new phone tree was implemented on Oct. 25, 2016. Since the phone tree has been in place there has been a reduction in transferred calls from 28% to 14%. Team members have expressed that customer feedback has been overwhelmingly positive.

Customer involvement:

DRS leaders conduct approximately 90 customer interviews monthly where we ask our recently retired members about their experience with DRS during their retirement process. DRS had received comments with concerns about confusion in wording with our old phone tree. The project team utilized these comments to help identify areas where we could improve wording to lessen confusion for our customers. Since the implementation of the new phone tree, DRS has received several positive comments in relation to the ease of using the new phone tree.

IV. Impact to Washingtonians:



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V. Project Results:

| Improved process as measured by: <i>(Click those that apply)</i> | Specific results achieved: <i>(Complete the narrative boxes below)</i> | Total Impact: <i>(Actuals; Current Reporting Period)</i> | Results status: |
|--|---|---|------------------------|
| <input checked="" type="checkbox"/> Time | Decreased Customers' time spent in phone tree from an average of 1 minute 20 seconds to an average of 45 seconds which equates to customers spending an average of 146 hours a year less time navigating a phone tree to get to a live person. | 146 hours of customer time saved per year | Final |
| <input checked="" type="checkbox"/> Customer Satisfaction | Increased Customer satisfaction by moving from 28% of customers – an average of 3,500 per month – opting out to the receptionist (because of confusion) to be transferred to the appropriate area to 13% – an average of 1,500 customers per month – requiring to be transferred after reaching the receptionist. | 24,000 additional customers per year getting to the right place the first time. | Final |

VI. Contact information:

Name: Jodi Yungdahl

e-mail: jodiy@drs.wa.gov

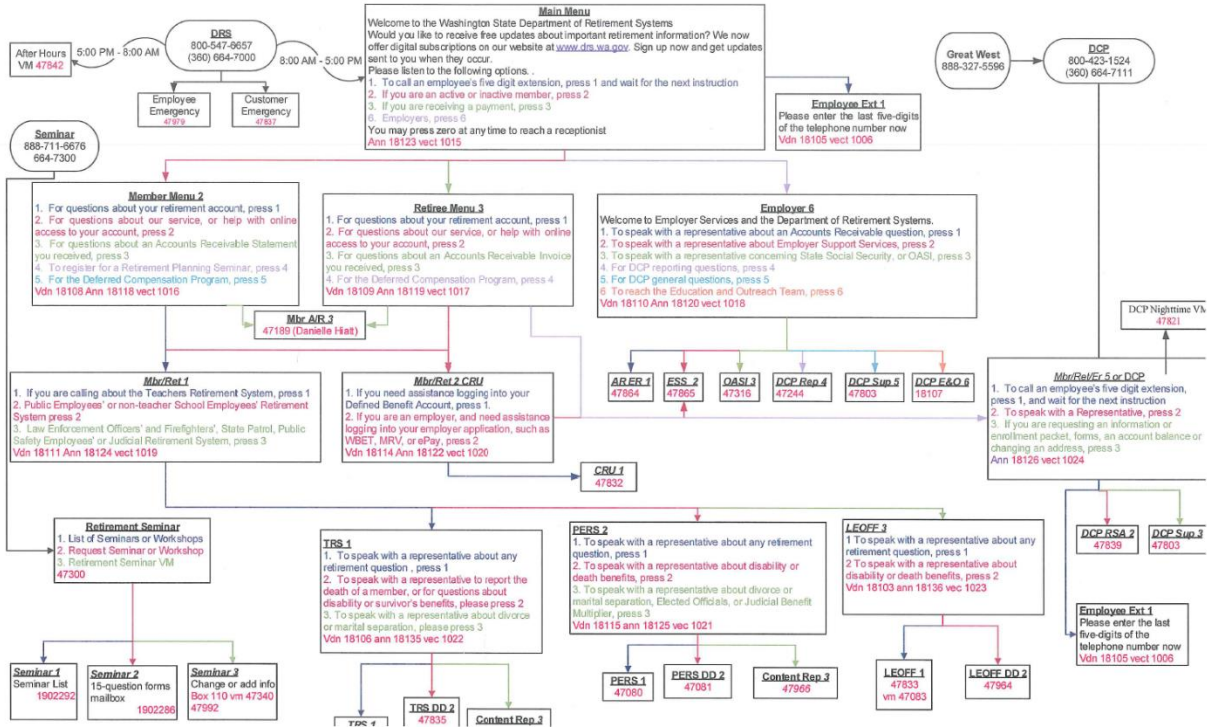
Phone number: 360-664-7042

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VII. Optional Visuals:

From Department of Retirement Systems Old Phone Tree



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To The New Department of Retirement Phone Tree

