Strategic Lean Project Report

For Reporting Period: January 1, 2015, through June 30, 2015

I. General Information:

Lead agency name: Department of Retirement Systems

Improvement project title: Online Account Access/Retirement Application Improvements

Date improvement project was initiated: 1/26/2015

Project type: New Project

Project is directly connected to:	**If applicable, specify the alignment:**
☒ Results Washington performance measure	Goal 5 1.1.a
☒ Other	This is a Customer Feedback Project that directly relates to the Department of Retirement Systems Outcome Measure O1, Customer Satisfaction.

Report reviewed and approved by: Shawn Merchant

II. Project Summary:

Acting on customer feedback, the Department of Retirement Systems implemented several updates to the popular Online Retirement Application, including enhancements to make it easier for customers to track the progress of their application, both during and after the submittal of their information.

III. Project Details:

Identify the problem: The Department of Retirement Systems regularly measures customer satisfaction using criteria organized under the categories of Respectful, Responsive and Right (accurate). These criteria were established in 2012 after DRS interviewed more than 1,200 customers to learn about their expectations for great service. One of the expectations under “Responsive” is that customers be kept informed of the status of their requests, including the status of a pending application for retirement.

Each month, DRS interviews about 90 newly retired members and measures their responses with the customer satisfaction criteria. These interviews are conducted by leaders across the agency. The goal is that at least 80 percent of customers interviewed express that their expectations were met or exceeded. While this goal was met over the last four quarters, there was a noticeable decline in satisfaction related to being kept informed of the status of retirement applications submitted online.

Problem statement: Currently, 78 percent of DRS customers expressed that their expectations were met or exceeded related to notifications during the retirement process compared to our target of at least 80 percent, which we want to reach by 12/30/2015.

Improvement description: Team members in DRS' Retirement Services and Information Services divisions analyzed customer responses to determine specific areas where communication was falling short of expectations. They learned that customers found the existing status information to be vague, and expected to see more detail than just an overall status of their application (such as confirmation of receipt of other documentation, for example). The team determined that updates could be made to the Online Account Access and Retirement Application screens to better communicate status to customers. Specifically, a Retirement Tracker was created to show customers exactly where they are in each step of the retirement application process, as well as the steps remaining, if any. Displays were also updated to show the scheduled retirement date, receipt and approval of required documentation, and expected first payment date. Additionally, periodic email notifications are now being sent to customers who have either initiated or completed their retirement application. These emails are customized to show the same information available through the Retirement Tracker.

Customer involvement: Everyone in a leadership role at DRS (about 90 people) interviews at least one customer each month to determine satisfaction levels in comparison with the criteria of Respectful, Responsive and Right. For purposes of this improvement project, DRS followed up with additional customer interviews to ask where DRS was not meeting expectations related to status updates and how the process might be improved. Below are some of the comments we received:

- The Online Retirement Application was really easy to use and the member stated she preferred to do everything online. She just didn't like that it did not let her know she hadn't finalized her application.
- Member was sometimes confused by when they would hear back from DRS, like, how long would it take to process their application?
- Member retired online, and she was surprised that she didn't get confirmations to keep her informed as her application was processed. She said she would have liked to see more communication regarding the status of her retirement. She said she worried about whether or not she'd really get her retirement check.
- Member said there was a misunderstanding about the need for additional documents when applying for retirement online and this caused some confusion.
- Member had concerns about the lack of communication while waiting for their first payment. They felt there was a lack of clarity of the application status "in process" when they check the website.

IV. Project Details:

Because these improvements were finalized in June 2015, the first opportunity to measure results will be in the August 2015 customer interviews (for July retirements). Additionally, because many begin the retirement process a year in advance, we expect to see the full benefit of the improvement (via an increase in customer satisfaction related to communication) within six to twelve months.

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Improved process as measured by: *(Click those that apply)*	Specific results achieved: *(Complete the narrative boxes below)*	Total Impact: *(Actuals; Current Reporting Period)*	Results status:
☐ Safety			
☐ Cost			
☐ Quality			
☐ Time			
☐ Customer Satisfaction		☐N/A (or)	
☐ Employee Engagement		☐N/A (or)	

V. Contact information:

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VI. Optional Visuals: Retirement Tracker now available to our customers using Online Account Access.