Detailed Lean Improvement Project Report

For the June 1, 2014, through December 31, 2014, reporting period

Agency name:
Department of Retirement Systems (DRS)

Improvement project title:
Agency Workload Management (AWM)

Date improvement project initiated:
August 19, 2013

Summary:
As DRS transitioned to a new, more responsive structure for its customer-facing division, team members were having difficulty identifying pending and completed workload. DRS built a visual management tool that pulls data from multiple systems and applications and displays workload status in a single-screen format, accessible on desktops and wall monitors.

Details:

Description of the problem: DRS prides itself on being customer-focused. In 2013 the agency restructured its customer-facing division, Retirement Services, creating a Processing Center to manage retirement applications and a Contact Center to field customer phone calls. DRS also moved to a First-In, First-Out approach to distributing work. With these changes, team members found it harder to see their impact on the workload, and to determine where to focus next to serve our customers most effectively.

Description of the improvement: For the Processing Center, workload data is critical for success. Team members rely on this information to manage the flow of retirement applications and other transactions. The DRS web team developed an application that pulls workload data from the mainframe and other systems, compiles it and displays it on a single web page. Team-specific data is displayed on monitors in each team's work area. The data is updated as often as each minute to ensure accuracy. For the Contact Center, phone system status is critical. DRS developed the capacity to display key information about its phone queues in real time, including number of calls waiting, and average wait time. This information is displayed on wall monitors throughout the Contact Center work area.

In addition to workload management, team members also wanted to be better informed about activities on other teams. DRS implemented a streaming message feature for each monitor, which can be used to communicate important changes, as well as fun facts or other engaging information.

Specific results achieved: The new structure in the Retirement Services Division is the biggest reorganization DRS has experienced since the agency was created more than three decades ago. Workload management is an example of how DRS incorporated team member feedback to stabilize the transition and support those team members in meeting customer expectations. Team members can now make in-the-moment decisions about where to focus, as well as easily see the impact their work is having. They do not need to visit multiple applications or screens to see the data, and they use this information in their daily huddles to focus resources for the day.

How we involved customers or stakeholders in this effort:

DRS considered customer feedback about its phone service. For example, when transferring a call to a Retirement Specialist, team members can now answer common questions like "Do you know if I will be on hold?" or "Do you know what the current wait time is?"

DRS' Agency Workload Management application is internal facing, and supports team members in providing services to customers and stakeholders. It does indirectly benefit customers as DRS improved its focus on customer needs.

Contact person/s:

George Pickett