

# Detailed Lean Improvement Project Report

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

**Agency name:**

Office of Financial Management

**Improvement project title:**

Facilities Work Order Process (Office Phones, Office Supplies and Ergonomic Equipment Orders)

**Date improvement project initiated:**

11/18/2013 – 2014 update as project continues with Plan-Do-Check-Act cycles

**Summary:**

The OFM Director's Office Fiscal and Operations Facilities team held an improvement workshop in November 2013 where the objectives were to increase process efficiency, increase ability to cross-cover requests among the process operators to reduce downtime and increase customer satisfaction related to communication about the work order status. The team continues to test countermeasures for the problems identified as part of the Plan-Do-Check-Act cycles necessary for making Lean improvements

**Details:**Description of the problems:

Problem 1: For office phones, each operator handled requests differently and a number of rework or clarifications were required causing the process to take more time in order to complete the phone setup. There were also defects passed on through the process due to the lack of documentation about special programming and setup details which caused rework and increased time to process an office phone request.

Problem 2: For office supplies, there was no way for others on the team to know when inventory was low and so it would be difficult to cover the work effectively when the primary operator is away from the office. From the employee standpoint, there was no standard way to alert operators for peak, future high-volume supply use and there was not easy visibility by the employee making the order about what the timing of special order supplies would be versus what and when standard items would be replenished.

Problem 3: For ergonomic equipment, it was not easily understood how or when to order an ergonomic assessment and there were risks that staff would order the wrong equipment or not address the need appropriately without an assessment. Additionally, the process for ordering the equipment was not clear or documented and relied on only one operator to perform. Finally, there was a lack of visibility of available ergonomic equipment that was previously returned to inventory which could be redeployed, so there was a risk of ordering new equipment when a suitable unit was already on hand.

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### Description of the improvements:

Improvement 1: For office phone ordering process, the New Employee form was updated to add guidance and prevent common errors. This was done by updating the New Employee Form submission process in October 2014. A shared resource was created for “special programming” on existing phones and available, recycled numbers to prevent errors going forward on new phones when reusing lines. This was created during the reporting period and has provided communal information to the team about special numbers.

Improvement 2: For office supplies ordering process, labeling and knowledge transfer improvements for the team to respond to special orders in process. This has provided quick reference multiple times to be able to respond to customers when Procurement lead is unavailable.

Improvement 3: For ergonomic equipment ordering process, future items to be developed are a standard education document on the Facilities intranet page and to help employees through the orientation process and an installation checklist with troubleshooting section to establish standard work for the team to use during installations.

Specific results achieved: The facilities team is monitoring the improvements implemented and have incorporated the Plan-Do-Check-Act discussions into regular team meetings. As problems arise, they are learning to develop countermeasures to continually move forward toward the goal of efficient and effective ordering with increased customer satisfaction.

### **How we involved customers or stakeholders in this effort:**

The event included representatives from the Facilities team who perform the work, and customers in Director’s Office Employee Services and Results WA who regularly order the services to help improve the process from the customer’s perspective.

### **Contact person:**

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