Strategic Lean Project Report

Beneficiary Designation Rejection Process Improvement

Agency: Department Of Retirement Systems

Project Impact
The Department of Retirement Systems (DRS) improved the Beneficiary Designation Rejection Process, resulting in a time savings of over 3 minutes per form, a reduction in the cost of printing and mailing forms, and an increase in quality by decreasing the steps to complete the process from 25 steps to no more than 8 steps.

Project Summary
Team members in the DRS Central Reception Unit (CRU) identified a gap in a process, indicating that it took too long for a CRU team member to reject a beneficiary designation form that was filled out incorrectly. The team members expressed that the current process was cumbersome and led to confusion and inconsistency among the CRU team; and it confused some customers because when they received the rejection form from DRS, they would either call or send incorrect information back to DRS a second time.

Working with CRU team members, DRS implemented the following improvements:
- Streamlined and standardized the process
- Trained team members to use the new process
- Began to inform customers via email of their options for updating beneficiary designation information
- Revised the beneficiary designation rejection form

Project Results

Cost
- Decreased in postage and printing costs from $4500 annually to less than $500 annually.

Quality
- Increased in team consistency by reducing the steps in the process from 25 to no more than 8.

Time
- Decreased in time spent on completing the beneficiary rejection process from an average of 4 minutes and 22 seconds to an average of 1 minute and 7 seconds.

Customer Satisfaction
- Increased in customer satisfaction interview scores, in relation to “being informed of status of a process,” from 73% in the quarter ending July 2015 to 87% in the quarter ending April 2017.

Over $4000 savings by decreasing the number of paper forms sent to customers.
Well over a 1/2 decrease in process steps has led to a streamlined consistent process.
Over 141 hours saved annually by decreasing the steps in the process.
14% increase in customer satisfaction scores
Project Details

Project Contact: Jodi Yungdahl  
Email: jodiy@drs.wa.gov  
Phone: 360.664.7042

Report reviewed and approved by: Tracy Guerin, Director Department Of Retirement Systems

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