

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

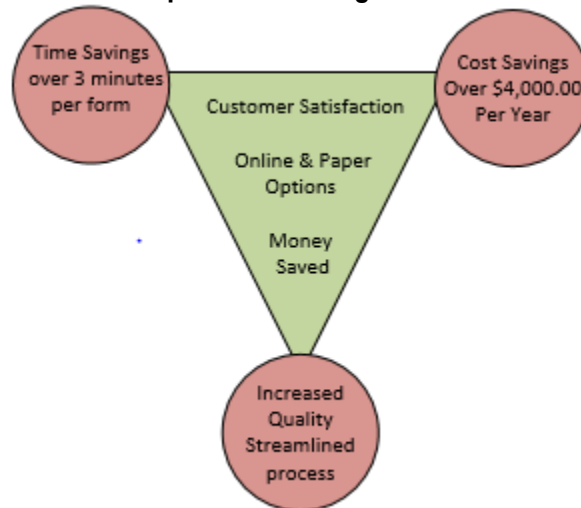
Project Results

 Cost	Decreased in postage and printing costs from \$4500 annually to less than \$500 annually.	→	<i>Over \$4000 savings by decreasing the number of paper forms sent to customers.</i>
 Quality	Increased in team consistency by reducing the steps in the process from 25 to no more than 8.	→	<i>Well over a 1/2 decrease in process steps has led to a streamlined consistent process.</i>
 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.	→	<i>Over 141 hours saved annually by decreasing the steps in the process.</i>
 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.	→	<i>14% increase in customer satisfaction scores</i>

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Impact to Washingtonians



Project Details

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

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