

KAIZEN RESULTS

Ohio citizens who have unclaimed funds will receive their money up to 150 days faster

IN BRIEF: The Unclaimed Funds unit serves as guardians of money that sits unclaimed in Ohio's banks, credit unions, insurance policies, investment portfolios, and elsewhere. The office disburses the funds when people show that they are the rightful owners. A claimant must submit documentation to prove their claim, so it's the kind of information-heavy process that can get complicated. That's why team members used Kaizen during an intensive week of major improvement. They were intent on transforming the claims process to make it simpler, faster, and better for everyone.

MAJOR STREAMLINING: The number of steps in the process will be reduced by 82% once the improvements are in place.

FAR FASTER SERVICE: People will receive their funds within 14-22 days of submitting a claim – compared to a range of 105-162 days in the past.

DIRECT SAVINGS: Reduced printing and postage expense will produce savings estimated at \$208,000 per year.

Kaizen Event RESULTS SCORECARD	BASELINE	PROJECTIONS	
	Key process measures, gathered at the start of the Kaizen event	Projected measures once all improvements are in place	PROJECTED CHANGE
PROCESS STEPS	154	28	82% reduction
DECISION POINTS	36	3	92% reduction
WASTE POINTS	35	1	97% reduction
Overall Process Time	105-162 DAYS	14-22 DAYS	

Reduction in process time ranges from 79% to 91%

DETAILS

When an individual or organization discovers that the State is holding funds that are rightly theirs, they can submit a claim form to the Department of Commerce to retrieve the funds. Those claims are then processed to verify ownership and to determine exact amounts. In cases where the claim is approved, a check is then sent to the claimant.

The process has been in place for years, so it shouldn't come as a surprise that things had gotten complicated. The everyday way of doing things had come to involve too many steps, decision points, and rework. This was leading to frustration all around, among customers and staff alike.

That's what prompted a Commerce team to apply the tools and methods of Kaizen – in order to transform its process in a serious and sustainable way.

Team members began the week-long Kaizen event by analyzing every aspect of their current process. They identified 154 individual work steps, 36 decision points, and 35 instances of

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Team members: Larry Brown, Supervisor, Claims Processing (Team Co-Leader); Constance Gamble, Supervisor, Support Services (Team Co-Leader); Michell Anderson, UCF; Angelia Brown, UCF; Tasha Butts, UCF; Janessa Haynesworth, UCF; Toya Johnson, UCF; Sonya Palm, UCF; Deborah Mercer, UCF; Sue Thomas, UCF; Lee Thatcher, DIC; Patrick Wilson, Public Safety.



BEFORE: The team-created map above shows how the Unclaimed Funds claim process looked *before* the Kaizen event.

AFTER: As you can see on the right, the team went on to “lean up” the process, making it simpler, faster, and better for customers and staff.

waste – too many by anyone’s measure. Then the real work began as the team discussed the situation, identified possible changes, reached consensus on a redesigned process, and developed a set of detailed implementation plans.

The new process will have just 28 steps – an 82% reduction over the previous approach. It will have 3 decision points – down by 92%. And it will sail through in 14-22 days from when a person submits a claim to when they receive a check.

One key improvement has to do with claim intake. The new process gathers incoming claims in one area, with an ongoing flow of set-up and scanning. This replaces the previous approach of batching claim forms in multiple locations.

The new process makes use of desktop faxing and the electronic sharing of files and documents in PDF format. This will reduce considerable walk-around time and general frustration, giving claims staff quick access to the information they need.

Eventually, there will be a move toward online claim submissions. Once customers are submitting their claims and documentation online, the chance of errors and missing information will be significantly reduced – ensuring that claims get processed in one efficient pass. Plus, the online approach will reduce hard-copy mail and all the expenses that go with that, including scanning costs.

During the report-out presentation at the end of the week, a team member told how she was skeptical when the Kaizen event got under way.

“I was thinking, are these people (from LeanOhio) going to come in and simplify or oversimplify our job duties? But from day one, they gave us the tools. We did a lot of talking, we listened. We felt comfortable bringing every idea we had to the table. We accomplished a great deal, and I’m very proud.” ●

