



Green Belt Six Sigma Project Report Out

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Office of Budget and Management – Ohio Shared Services (OSS)

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# OSS QA PROCESS IMPROVEMENTS

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- Team Overview

Name	Role
Korrina Thomas	Project Sponsor
Tim Ogonek and Gerry Sadorra	Project Management
OSU Green Belt Team	Project Support
QA Team	Process Stakeholders
AP Team	Process Stakeholders
Service Management Team	Reporting and Data

# BACKGROUND – SCOPE

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- Problem Statement: On average, the Accounts Payable QA process currently outputs one review every **7:42** which will fail to meet the expected increase in demand requiring one review every **6** minutes in the next 6 months.
- Scope: QA Review Process
  - First Step: QA sample is created.
  - Last Step: Associate reviews QA decision and accepts or disputes.

# PROJECT GOALS

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- Decrease QA AP processing time from 7:42 minutes per review to  $\leq 6$  minutes per review
- Reduction in lag time for time to deliver error review to  $\leq 2$  days
- Provide Associates better clarity on QA errors and overall process

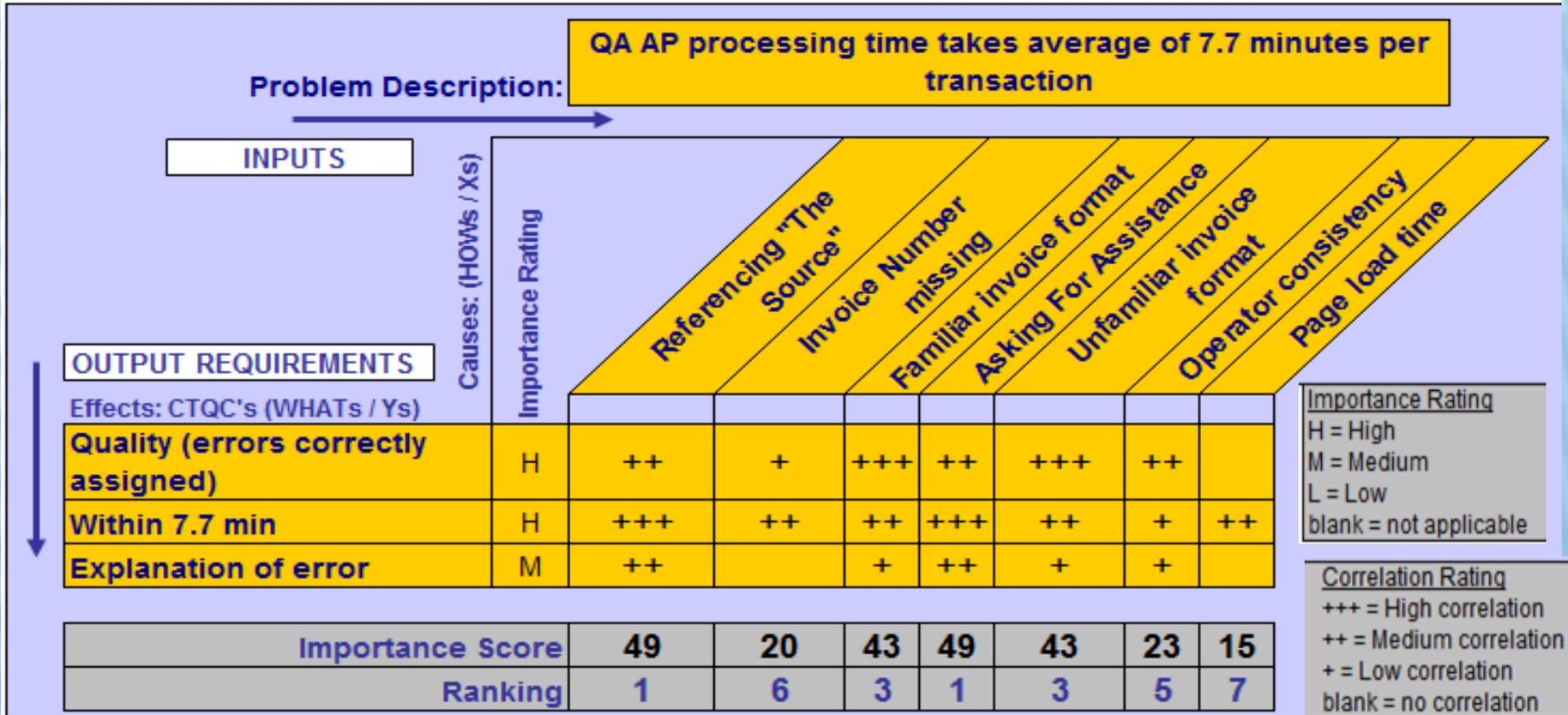
# BASELINE DATA

- Current Cycle time: 7 minutes 42 seconds
- A defect is any time it takes longer than 6 min to complete a review

Number of Defects	5
Number of Units	31
Number of Opportunities Per Unit	1
<b>Defects Per Million Opportunities</b>	161,290
<b>Sigma Level</b>	2.5

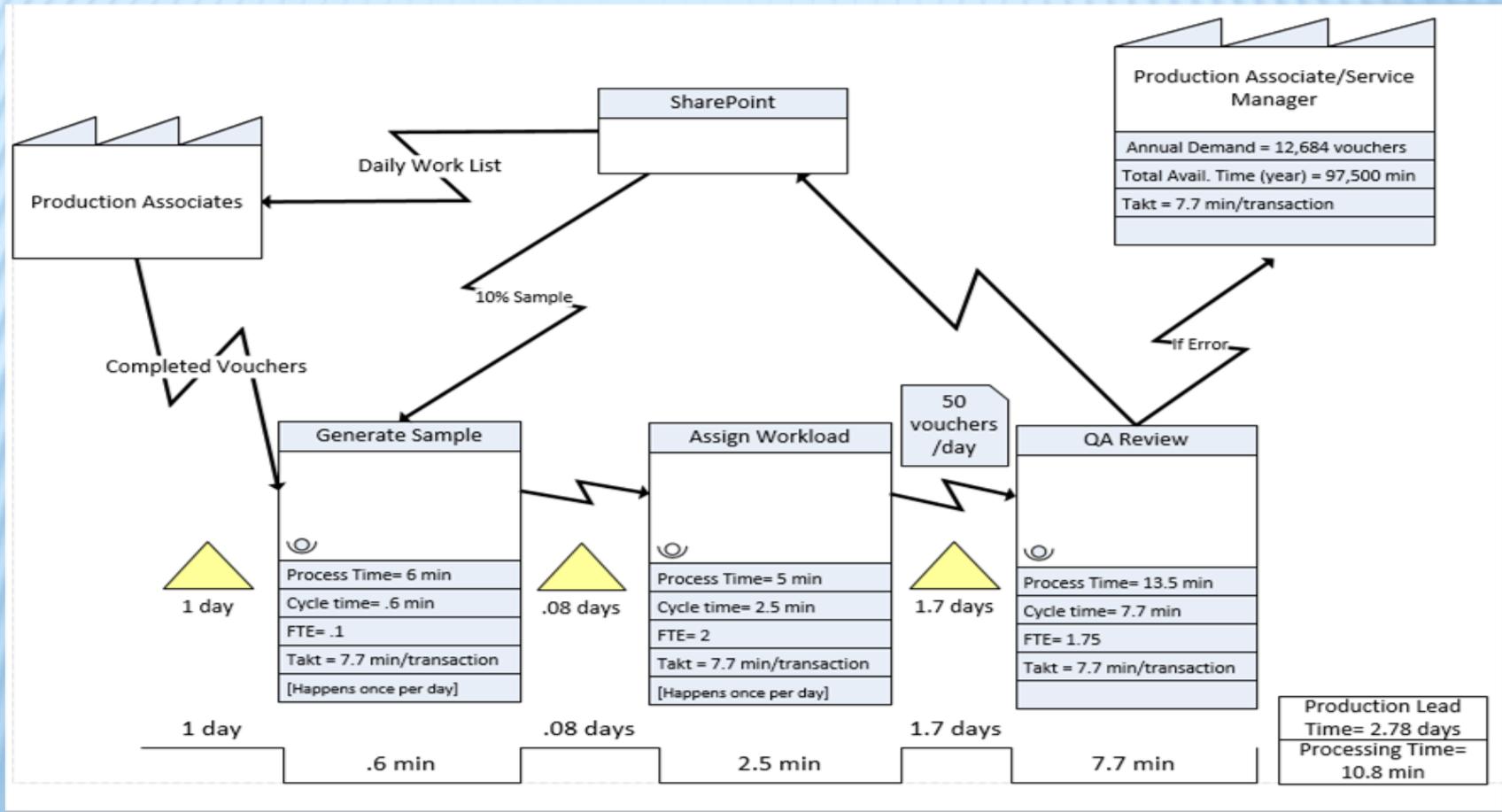
# DATA COLLECTION PLAN

## CAUSE AND EFFECT MATRIX



# DATA COLLECTION PLAN

## VALUE STREAM MAPPING

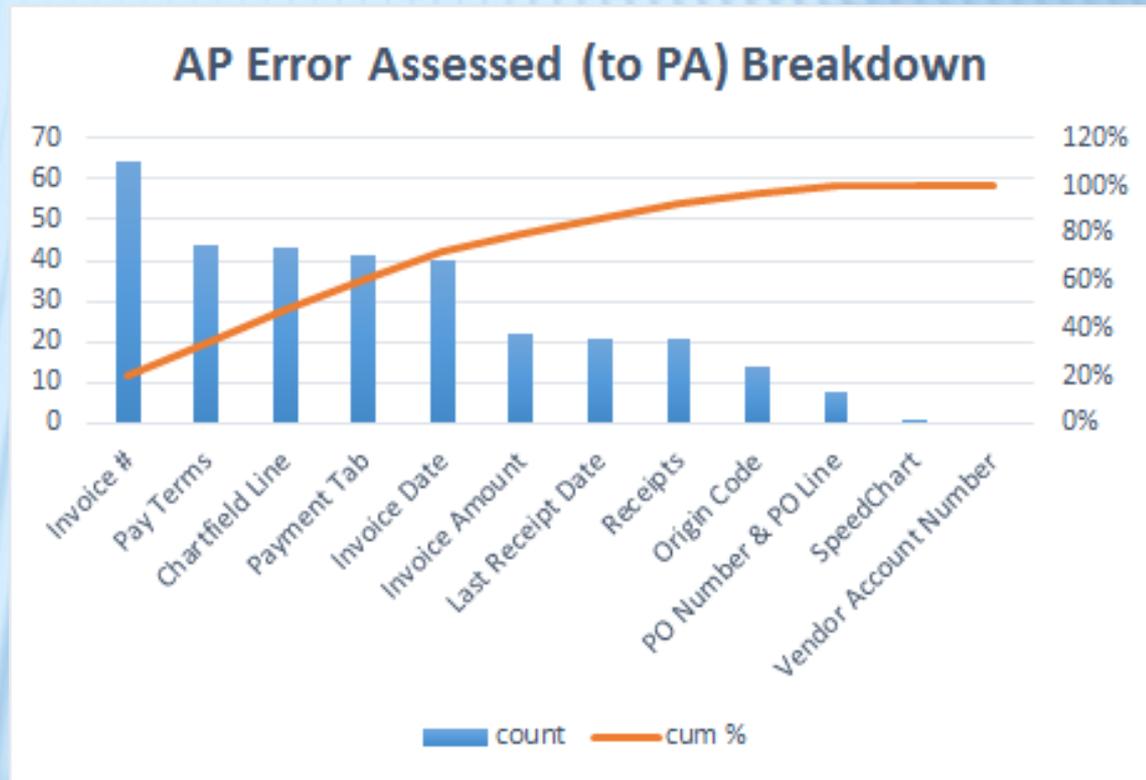


# ERROR SUMMARY PARETO CHART

Most common error is

invoice number:

- Variations in invoices require unique formatting of invoice number



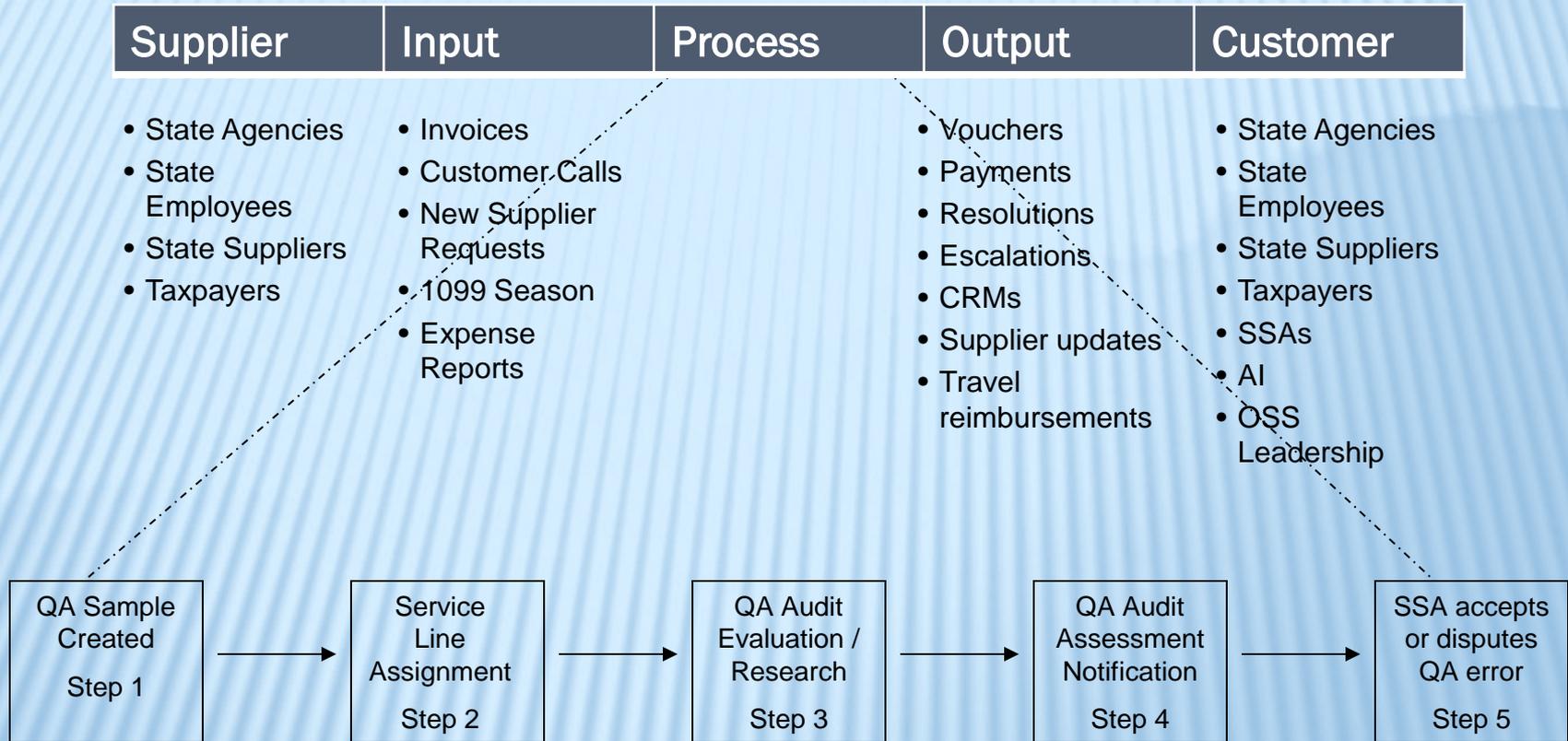
# ERROR BREAKDOWN

Error Breakdown														
Invoice Date	Invoice #	Origin Code	Last Receipt Date	Invoice Amount	Pay Terms	PO Number & PO Line	Payment Tab	Vendor Account Number	Chartfield Line	Receipts	SpeedChart	PPF Policy	Exception Category	Correctly Assigned
<b>Total</b>	<b>144</b>	<b>228</b>	<b>58</b>	<b>47</b>	<b>77</b>	<b>105</b>	<b>28</b>	<b>183</b>	<b>0</b>	<b>98</b>	<b>25</b>	<b>6</b>	<b>0</b>	<b>0</b>
<b>March 2014</b>	9	15	2	0	5	5	1	13	0	5	1	0	0	0
	16%	27%	4%	0%	9%	9%	2%	23%	0%	9%	2%	0%	0%	0%
<b>April 2014</b>	19	24	2	0	9	5	2	23	0	8	5	0	0	0
	20%	43%	4%	0%	16%	9%	4%	41%	0%	14%	9%	0%	0%	0%
<b>May 2014</b>	13	21	4	0	10	14	1	22	0	3	1	1	0	0
	14%	38%	7%	0%	18%	25%	2%	39%	0%	5%	2%	2%	0%	0%
<b>June 2014</b>	9	13	2	0	2	6	1	6	0	3	3	0	0	0
	20%	23%	4%	0%	4%	11%	2%	11%	0%	5%	5%	0%	0%	0%
<b>July 2014</b>	11	8	6	29	3	4	2	11	0	7	1	1	0	0
	13%	14%	11%	52%	5%	7%	4%	20%	0%	13%	2%	2%	0%	0%
<b>August 2014</b>	10	10	5	3	3	1	1	8	0	4	2	0	0	0
	21%	18%	9%	5%	5%	2%	2%	14%	0%	7%	4%	0%	0%	0%
<b>September 2014</b>	17	14	7	15	9	11	0	13	0	4	1	1	0	0
	18%	25%	13%	27%	16%	20%	0%	23%	0%	7%	2%	2%	0%	0%
<b>October 2014</b>	3	10	2	0	6	5	4	16	0	4	1	0	0	0
	6%	18%	4%	0%	11%	9%	7%	29%	0%	7%	2%	0%	0%	0%
<b>November 2014</b>	9	23	4	0	5	12	4	18	0	11	0	0	0	0
	10%	41%	7%	0%	9%	21%	7%	32%	0%	20%	0%	0%	0%	0%
<b>December 2014</b>	21	30	11	0	10	18	10	23	0	12	5	2	0	0
	15%	54%	20%	0%	18%	32%	18%	41%	0%	21%	9%	4%	0%	0%
<b>January 2015</b>	11	34	7	0	9	12	2	17	0	21	4	1	0	0
	9%	61%	13%	0%	16%	21%	4%	30%	0%	38%	7%	2%	0%	0%
<b>February 2015</b>	12	26	6	0	6	12	0	13	0	16	1	0	0	0
	13%	46%	11%	0%	11%	21%	0%	23%	0%	29%	2%	0%	0%	0%
<b>Yearly Percentage Breakdown</b>	<b>14%</b>	<b>23%</b>	<b>6%</b>	<b>5%</b>	<b>8%</b>	<b>11%</b>	<b>3%</b>	<b>18%</b>	<b>0%</b>	<b>10%</b>	<b>3%</b>	<b>1%</b>	<b>0%</b>	<b>0%</b>

# VOICE OF THE CUSTOMER

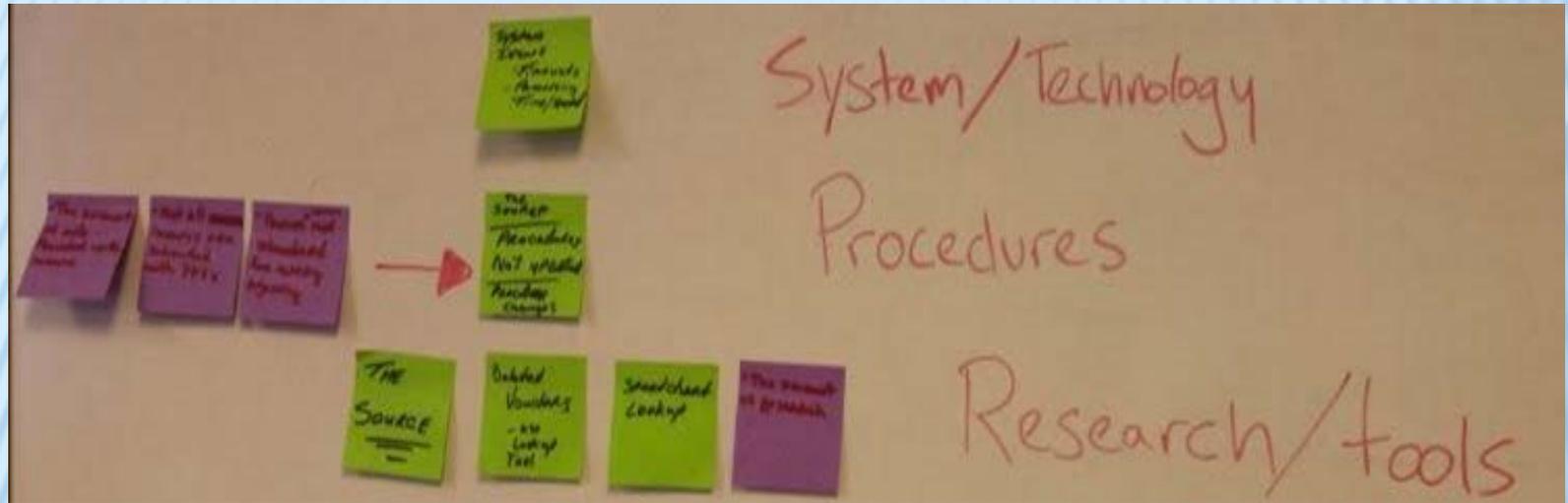
	<u>Customer Issue</u>	<u>Customer Need</u>
★	<b>"I've heard three different ways random work is generated, I don't know what the process review of a voucher looks like"</b>	Clear step by step QA process
	<b>"Who qa's the QA team?"</b>	Clear quality metrics for QA work
★	<b>"Several Associates get errors for the same issue because it is not shared with the teams"</b>	Proactive error communication
★	<b>"Not sure how I can get an error on 3/28/14 for something I processed on 3/19/14"</b>	Timely review of transactions
	<b>"Why aren't QA associates 'experts' in the service lines they provide quality assurance to?"</b>	Knowledgeable QA associates

# SIPOC DIAGRAM – OSS QA PROCESS





# BRAINSTORMING



## Ground Rules:

- No criticism of ideas
- Any idea is valid
- No discussing ideas until decision

## Directions:

- 5 min to individually write down ideas
- 3 min to categorize them as you see fit on white board
- 10 min to discuss results
- 2 min to voice final thoughts

“What inputs cause one AP review to take more time than another?”

# ROOT CAUSE ANALYSIS

*Identifying the most significant causes of defects.*

## Search Capabilities in the Source

- Requires specific wording, phrases, or prior knowledge to produce results
- Used in almost every review, consistently effecting the output
- Interpretation impacts work quality
- Identified as pain point during brainstorming

## Invoice Format

- Finding information that is embedded within the invoice adds time, especially when format is inconsistent and unfamiliar
- Information can be missing, leading to further research and investigation
- Identified as pain point during brainstorming

# PROJECT METRICS

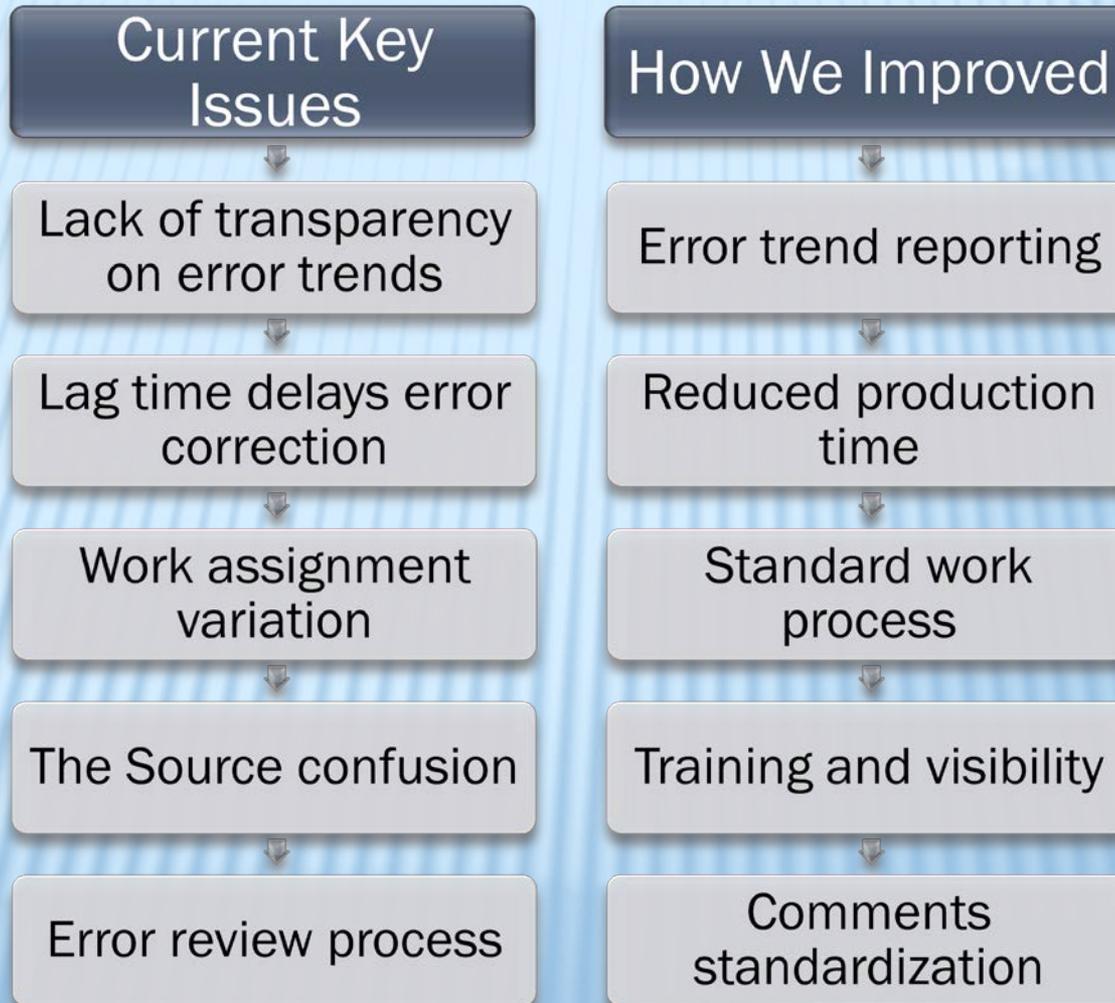
Measure	Result		
<b>Individual Capacity</b>	Increased individual capacity through improvement implementations.		
<b>Cost Savings</b>	Over Time Cost Avoidance		
<b>Cost Savings</b>	FTE Allocation Avoidance		
Measure	Before	After	Difference
<i>Cycle Time</i>	7 min. 42 sec.	3 min. 42 sec	- 52%
<i>Time to Complete Review</i>	1.0 days	0.6 days	- 40%
<i>Defects Per Million</i>	161,290	64,516	- 60%

# PROJECT BENEFITS - INTANGIBLE

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- Increased clarity on QA errors
- Data collection and trend analysis
- Identification of standard process and procedural use implementation
- Process knowledge increase
- Customer communication

# IMPROVEMENT SUMMARY



# IMPLEMENTATION PRIORITIZATION

Project	Importance		Time to		Feasibility		Time		Leverage		Total
	to Customer		Implement		(Likelihood		Reduction		(Positive Impact		Project
	Rate 1 to 5		Rate 1 to 5		Rate 1 to 5		Rate 1 to 5		Rate 1 to 5		Priority
	High = 5		High = 1		High = 5		High = 5		High = 5		
	Low = 1		Low = 5		Low = 1		Low = 1		Low = 1		
Vendor Relationship Mgmt	4	x	2	x	3	x	3	x	5	=	360
Search terms in "The Source"	4	x	3	x	3	x	3	x	4	=	432
Error Communication Push	4	x	5	x	5	x	2	x	2	=	400
Auto Populated invoice	5	x	1	x	1	x	5	x	5	=	125
work Assignment Improvements	2	x	5	x	4	x	2	x	2	=	160
Interactive Infographic	4	x	1	x	3	x	3	x	4	=	144
Standard Error Comments	4	x	3	x	4	x	4	x	2	=	384

# IMPLEMENTATION PLAN

Task	Who	When	Status
Monthly Error Reporting	Service Management	Monthly	Implemented
Work Assignment Improvements	Ogonek	11/1/14	Implemented
QA Processing Best Practices	Ogonek	11/1/14	Implemented
Source Training	Sadorra	2/5/15	Implemented
Standard Error Comments	Ogonek / Sadorra	4/15/15	Open
QA Workflow Tool Solution	Ogonek / OBM IT	9/5/15	Open
Error Notification Automation	Ogonek / OBM IT	9/5/15	Open
Source Infographic	Sadorra	9/15/15	Open

# **SPECIAL THANKS TO...**

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**Everett Ross**

**Ohio Shared Services Lead**

**Korrina Thomas**

**Ohio Shared Services PMO Lead**

**Green Belt Students**

**OSU Fisher College of Business**

**LeeAuna Neely, Kurt Szabo, Mike Croom**

**Ohio Shared Services QA Team**

**Alex Roman, Ed Martin, Jessica Gravely**

**Ohio Shared Services Service  
Management Team**