← Plan →

← Do, Check, Act →

Theme: *Prescriptive Lighting Rebate Program*
Problem Statement: Projected increase in number of applications will overburden current process.

Problem Owner: MD; Team: DE, KV, GV (AKA **The Kaizenators**)
**Coach:** Karen Martin

Background

Program provides funds when energy efficient lighting is installed
- Multiple points of submittal and contact
- Forms routed thru same person multiple times
- Demand expected to triple in 2010 with no additional resources
- Program budget doubled for 2010
- Process will serve as model for future prescriptive Green programs

Applications: 2009 = 60, 2010 = 175
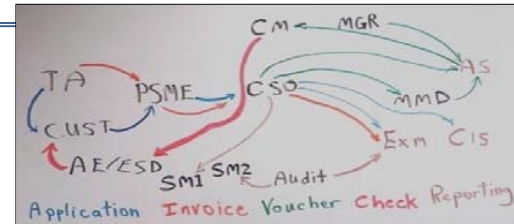Budgeted (Thousands): 2009 = $250, 2010 = $500

Current Condition

- Incomplete paperwork from Customer/ Trade Ally
- Disorganized data management/ redundant data entry
- Multiple points of contact at submission & invoicing
- 19 days for customer to receive rebate check. Process time is only 2.3 hours.
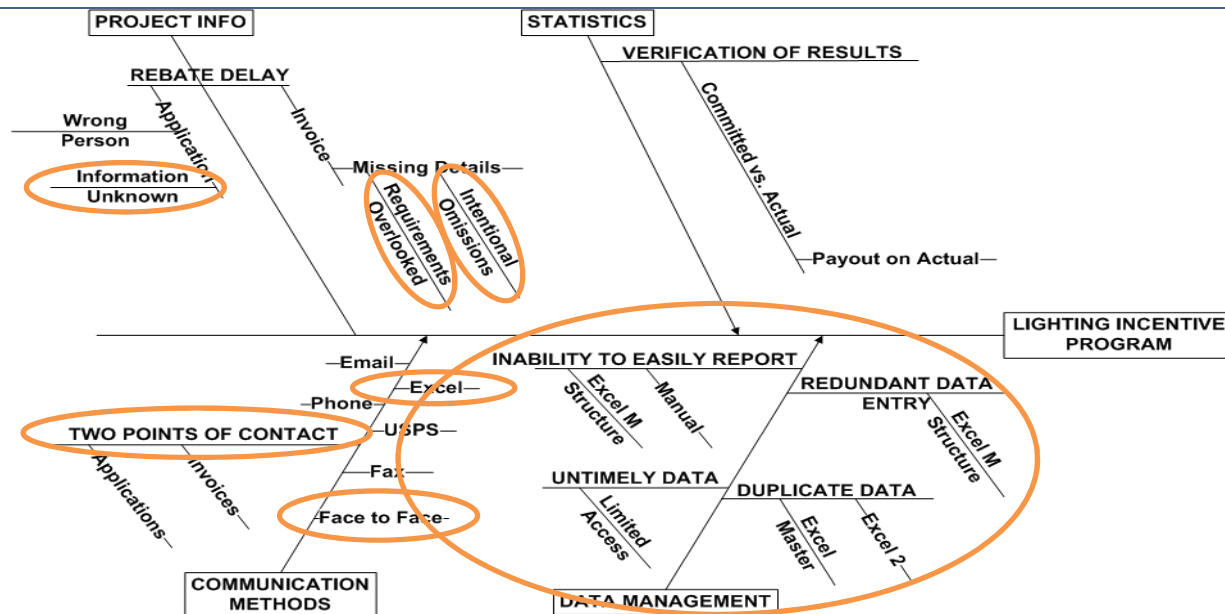- Conflicting statistics reported to Senior Management
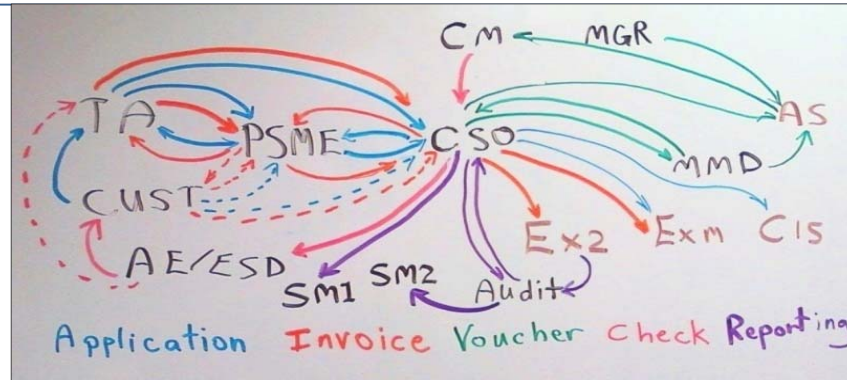
Target Condition/Measureable Objectives

- Improve %C&A on initial application from 75% to 90%
- Improve %C&A on invoice from 66% to 85%
- Reduce Lead Time from 75 days to 68 days (10%)
- Reduce Process Time from 3.5 hrs. to 1.5 hrs. (57%)
- Increase correct delivery point of application to 95%

Root Cause Analysis

Countermeasures/Implementation Plan

#	Improvement Activity	Type	Accountable	Due Date	% Complete	Completion Date
1	Create web interface for data entry & validation	P	Chad/Pat H	TBD		
2	Create database application	P	Jen/Cindi	5/28/2010	10%	
3	Create audit reports	P	Gina	5/28/2010		
4	80-day reminder auto-generated to CSO Clerk	P	Jen	5/28/2010		
5	Create shared mailbox/distribution list for apps & invoices	KE	Jen	4/6/2010	100%	4/5/2010
6	Eliminate preliminary audit information	KE	Gina	4/1/2010	100%	3/16/2010
7	Mail check to customer	JDI	Jen	4/1/2010	100%	4/1/2010
8	Reduce pre-approval site visit	KE	Chad	4/1/2010	100%	4/1/2010
9	Add examples of APPL/INV to future TA training	KE	Jen	4/14/2010	100%	4/6/2010
10	Remove collection of facility info from process	JDI	Chad	4/30/2010	100%	4/1/2010
11	Eliminate labor cost itemization on invoice	JDI	Judy	4/7/2010	100%	4/1/2010
12	Revise content of lighting equipment application	JDI	Judy	5/5/2010	95%	
13	Prepare examples of completed invoice & application	JDI	Jen	5/4/2010	100%	5/4/2010
14	Communicate revised process to TA/Customer	JDI	Chad	5/5/2010	20%	
15	Train multiple TA reps	JDI	Jen	4/7/2010	100%	4/7/2010
16	Create job aid	JDI	Jen	4/26/2010	15%	

Effect Confirmation

RESULTS:
- **10.15%** Improvement in Lead Time
- **57.28%** Improvement in Process Time
- **62.68%** Improvement in Rolled First Pass Yield

VERIFICATION:
- Monitor %C&A on initial application to achieve 90%
- Monitor %C&A on invoice to achieve 85%
- Monitor delivery point of application to achieve 95% consistency
- Maintain time span of < 9 days between invoice approval and check delivery

Process Owner- Judy S
Frequency - Quarterly

Follow-up Actions

- Identify personal touch point/method associated with check delivery
- Re-evaluate process prior to 2011 program
- Educate process owner on use of metrics to monitor process