



Iowa Utilities Board Kaizen Event Report Out

“Team Assessments in Motion (AIM)”

February 3-7, 2014

The Opportunity

Nick Wagner, Board Member, IUB



“Team Assessments in Motion”

Leighann LaRocca



Alice Blalock-IUB, Cindy Funcheon-IUB, Malinda Ridout-IUB, Leighann LaRocca-IUB, Sam Cue-IUB, Judi Cooper-IUB, Brian Turner-OCA, Tom Balster- Alliant Energy, Larry Shi-OCA, Patrick O'Connor-Alliant Energy, Padmini Raichur-MidAmerican Energy, Marcia Tope-DOM, Erin Bothwell-ABD



Scope

Cindy Funcheon

- This event will address the IUB/OCA billing process from the point assignable time is identified to the point payment from the industry is posted for receipt.



Goals

Alice Blalock

1. Meet timeframes of when invoices are issued and mailed 100%
2. Reduce the number of billing sheets errors to 0%
3. Reduce invoice errors to 0%.



Objectives

Judi Cooper

1. Identify a framework for when invoices are to be sent out and due date.
2. Create efficiencies so that the opportunity for human error can be decreased.
3. Identify where in process technology could be applied.
4. Develop a communication plan to share with staff, stakeholders and industries.
5. Define clear and consistent billing codes for both direct and remainder assessment.
6. Ensure accurate billing and timely receipt of payment.



Kaizen Methodology

Erin Bothwell

- Clear objectives
- Team process
- Tight focus on time
- Quick & simple
- Necessary resources immediately available
- Immediate results (new process designed by end of week)
- 5S “mindset”--use the steps to support the event activities
 - Sort, Set in order, Shine, Standardize, Sustain



Current Process

Brian Turner



Brainstorming

Padmini Raichur

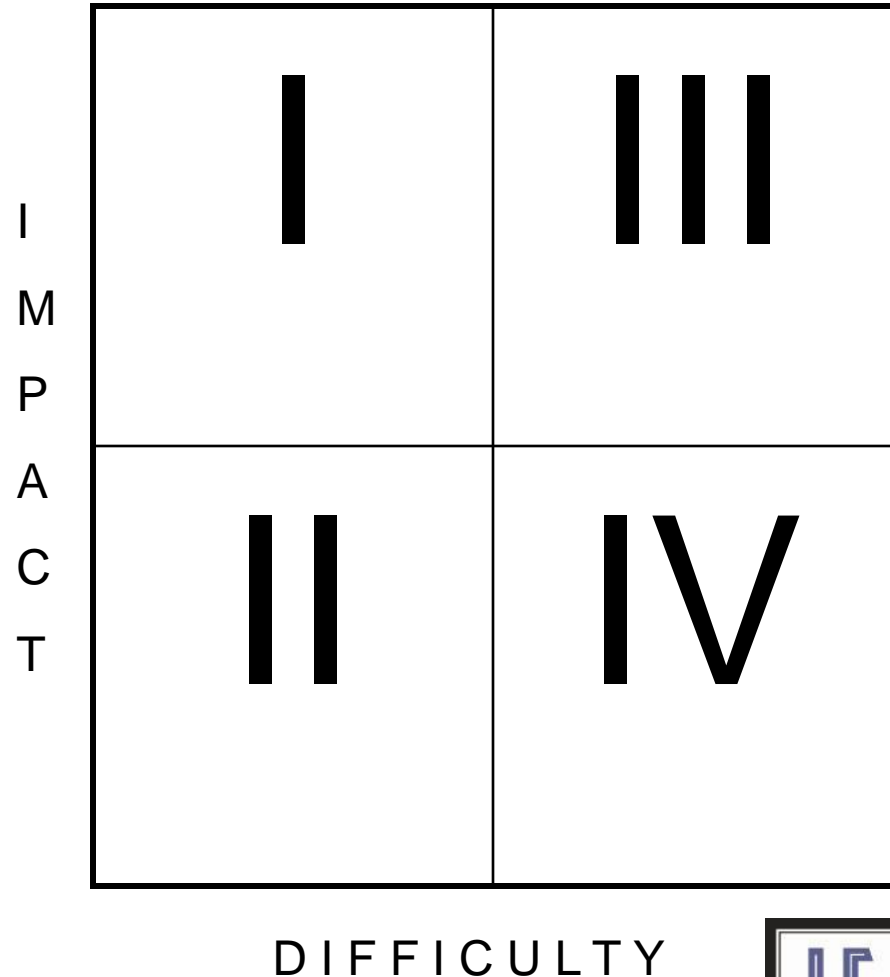
- Time sheet and Billing sheet two separate documents
- Electronic signature for billing sheet
- Send billing sheet electronically
- Enter non-billable time on billing sheet so it equals total time worked
- Send electronic invoices to customer
- Supervisor makes assignment that include billing descriptions
- Training on changes
- Payment via Electronic means



De-selection Process

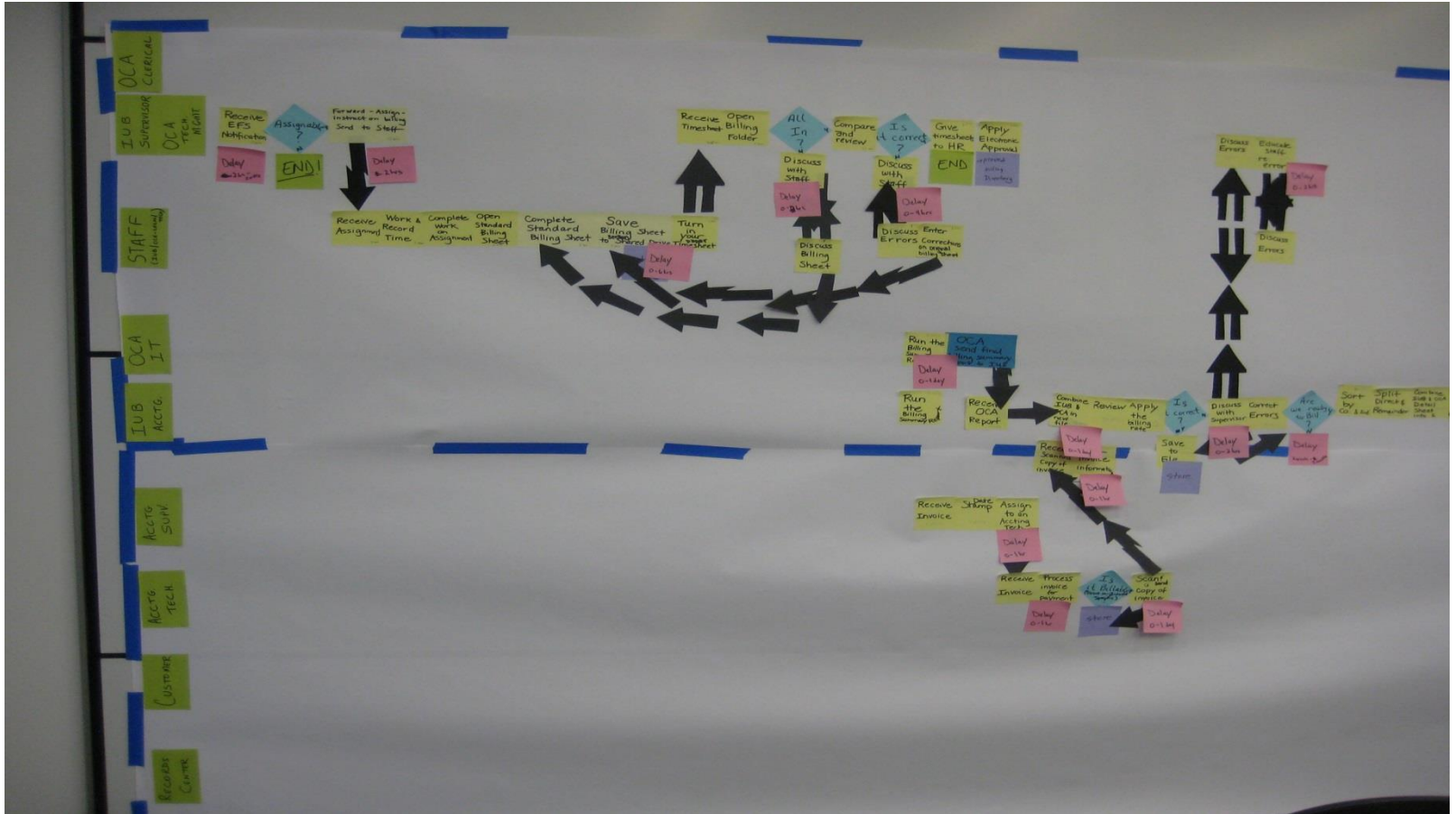
Pat O'Connor

- Identifies
 - Impact to customer
 - Difficulty implementing
- Helps to rate/rank solutions to resolve issues while identifying ease of implementation



New Process

Malinda Ridout



Results

Larry Shi

	OCA Current	OCA New	% Change
Total Steps	150	101	-33%
Total Delays	25	23	-8%
Average Delay Time - Days	65	46	-29%
Value Added Steps	21 (14%)	4 (4%)	na
Decisions	21	16	-24%
Loop Backs	7	7	0%
Total Handoffs	30	20	-33%



Results

Sam Cue

	IUB Current	IUB New	% Change
Total Steps	142	101	-29%
Total Delays	19	23	21%
Average Delay Time - Days	54	46	-15%
Value Added Steps	12 (8%)	4 (4%)	na
Decisions	24	16	-33%
Loop Backs	8	7	-13%
Total Handoffs	31	20	-35%



Homework

Pat O'Connor

Item	Item Description	Person Responsible	Due Date
1	Communication on budget updates between customer and IUB (electronic and/or two-way)	Brian/Judi/Tom Padmini/Pat	4/7/2014
2	Put billing sheets in shared space	Larry/Sam	3/7/2014
3	Hands on small group training	Brian/Judi	5/8/2014
4	Communicate role in overall process externally - Communicate to associations	Brian/Judi/Tom Padmini/Pat	8/7/2014
5	Train on when and where to bill time (ex. Reminders)	Brian/Judi	4/7/2014
6	Create a Q & A site	Sam	4/7/2014
7			
8			



Team Member Experience

Team members presenting this slide

Alice Blalock, IUB

Tom Balster, Alliant Energy

Brian Turner, OCA

Comments

- Marcia Tope

Department of Management

- Erin Bothwell

Alcoholic Beverages Division

**We welcome your
questions and comments!**

