

Lean Six Sigma Green Belt Project

Reduce the Number of CRITaR Billing Inquiry Tickets Received in Customer Settlements Resolved Outside of One Business Day

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Defining the Problem

Problem:

- ❑ Since January 2006, Customer Settlements Department (CS) has been unable to meet its goal of resolving CRITaR tickets by one business day within the Customer Settlements Department.
- ❑ Customer Survey indicates we are not meeting our customers needs
- ❑ The number of CRITaR billing inquiries resolved outside of one business day is 64%.
- ❑ The defect is any billing inquiry received in Customer Settlements not resolved within one business day.

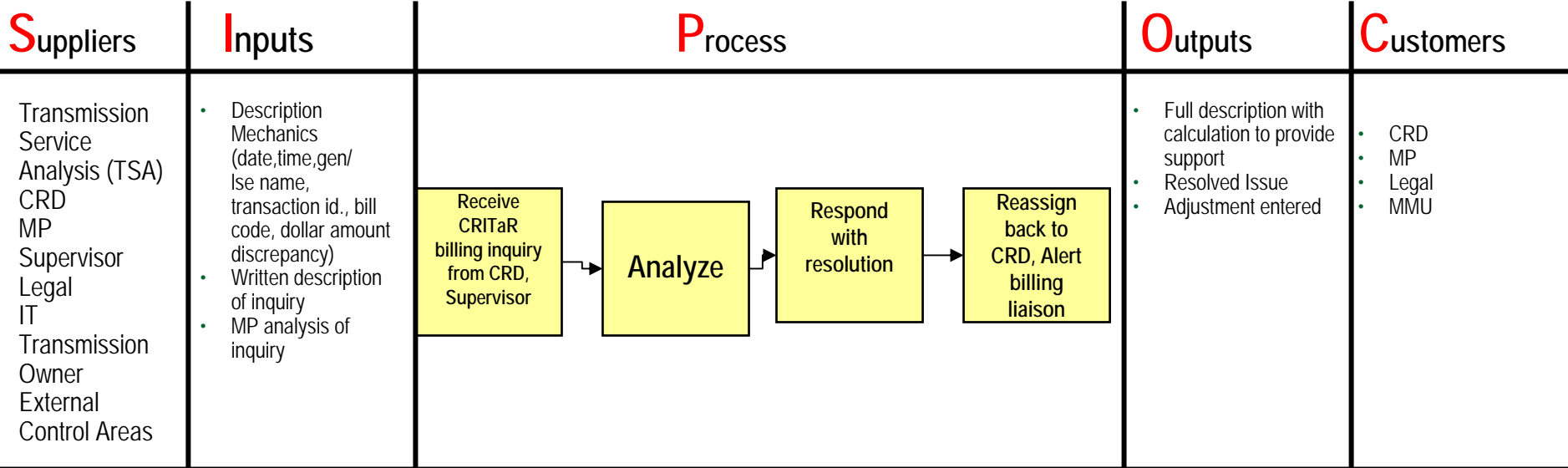
Scope :

- ❑ The scope is defined as when the CRITaR billing inquiry is assigned to the Customer Settlements Department to when the CRITaR billing inquiry is reassigned to another NYISO department.

Goal:

- ❑ To reduce the number of CRITaR tickets resolved outside of one business day by 70%.

SIPOC Map



Input Metrics	Process Metrics	Output Metrics	
<ul style="list-style-type: none"> • Accuracy of Issue description • Availability of data • Accuracy of data in billing inquiry 	<ul style="list-style-type: none"> • Rework of billing issue 	<ul style="list-style-type: none"> • Accuracy of CRITaR billing inquiry resolution 	Quality
<ul style="list-style-type: none"> • Response time from CRD • Volume of CRITaR Billing Inquiries 	<ul style="list-style-type: none"> • Number of steps • Number of days within Analyze phase 	<ul style="list-style-type: none"> • Number of days to resolve CRITaR billing inquiry 	Cycle Time
<ul style="list-style-type: none"> • Availability of Data 	<ul style="list-style-type: none"> • Number of staff 		Cost

Operational Definitions

Business day – weekday (weekends and holiday's are not considered a business day)

Inquiry – a request for information, a request for assistance, a request for action that may come in the form of a general question, comment, issue.

Customer Liaison -a customer relations resource that provides knowledge and expertise in specific areas within the business and serves as the primary contact for that business area.

CRITaR - Customer Relations Issue Tracking and Resolution – software application system used to record and track customer inquiries

Category – a classification within CRITaR that ties a inquiry to a specific functional area or process within the business.

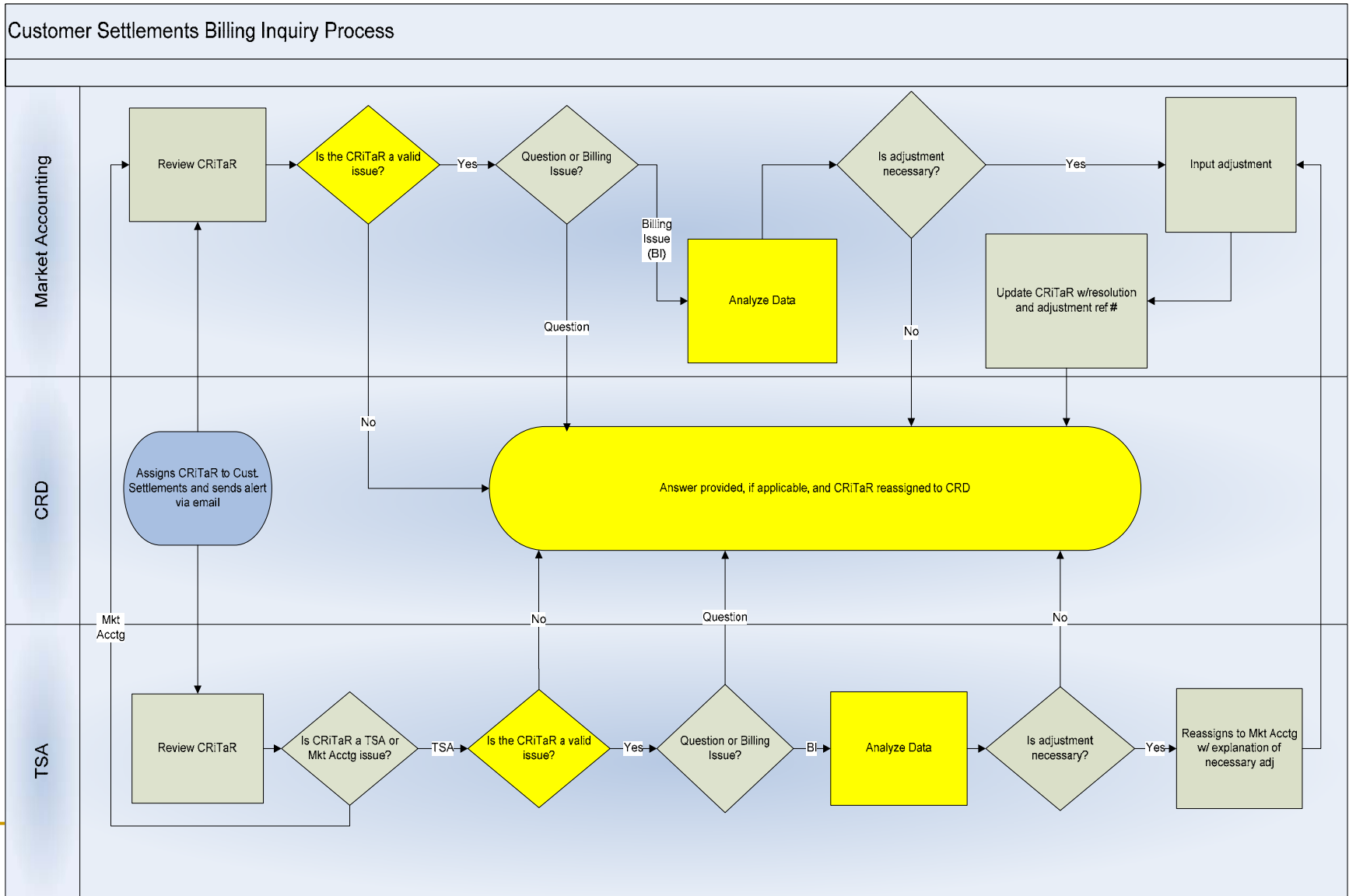
Subcategory- a classification system within a category within CRITaR that ties a inquiry to a more specific functional area or process within the business

Current assignee – the individual assigned responsibility to perform an action(s) on an inquiry at any point in time during the inquiry resolution process. This can be any and all NYISO employees.

Volunteered Department Personnel Input – a situation which occurs where a NYISO department member, who is not the current assignee, adds information which may be pertinent to the issue.

Segmented ticket - an Open CRITaR ticket which requires information from an outside source (another ISO) to fully resolve the ticket.

As Is Detailed Process Map



As Is Detailed Process Map Takeaways

- ❑ Customer Relations assigns the billing inquiries to Customer Settlements
 - Potential for communication problems
 - No criteria in place to use when assigning inquiries to categories

- ❑ Customer Settlements Department needs to verify if the inquiry is a billing issue

- ❑ No Mechanism in place to share information within the Customer Settlements Department

Measurement And Analysis Process on going

Change in the structure of the Customer Relations group affects how inquiries are assigned to Market Accounting Analyst

Change in supervisor role within the Customer Settlements Department affected the Customer Settlement process of assigning billing inquiries

See quick win slide

Measure and Analyze Pieces of Process are currently underway

Quick Win Improvement Opportunities

- September 2006 – changed the CRITaR assignment process to all Customer Settlements Inquiries, excluding Transaction and Metering anomalies, are assigned to one Market Accounting Analyst.
 - Allows less duplication of the record in database
 - Allows for the ticket response/resolution to be returned to Customer Relations Representative/Billing Liaison at the time of resolution

- December 2006 – established a weekly recurring meeting between Market Accounting Analyst and Customer Relations Billing Liaison to respond to outstanding billing inquiries

Stay tuned for the final results

- Questions