

# Getting back to business

## Lean improvements in travel, expense processes save employees time

By Stephen Davis

It's now easier for Boeing travelers to book cost-saving itineraries, submit accurate expense reports and be reimbursed quickly, thanks to the Shared Services Travel & Expense Services (T&ES) team applying Lean+ principles and tools.

Nearly 1,000 Boeing employees travel on company business every day. To get them into airplanes and nightly accommodations, account for their expenses and pay the bills is a job that takes lots of behind-the-scenes activity. Process improvements here help reduce costs for organizations, since travel is the second-most controllable cost for most, after labor.

"Our goal is to provide travel and expensing tools that save employees time, reduce travel costs and improve compliance. It's a top-priority service improvement in SSG. Ultimately our aim is to increase productivity for Boeing," said Yvette Winn, director of Travel & Expense Services.

T&ES began by using the Value Stream Mapping (VSM) tool, where those involved in a process create a chart showing all its steps. They used the resulting diagram of the employee travel process to guide their Process Management initiatives.

"Because we recognize that people have experienced difficulties with our process, we looked at it from end to end—when travelers book trips through when they complete their expense reports and see final payments to themselves and the Boeing credit card," Winn said.

The VSM activity involved users of travel services, people in organizations who oversee and interact with travel systems and processes, as well as supplier representatives. Participant Melanie Faulkner, from Commercial Airplanes' Customer Relations team, helps 25 co-workers expense their frequent travel to U.S. and international customer sites. "The travel-process frustration level is high with my co-workers, so I felt obligated to get everything out on the table," she said. "I felt I was listened to on every point."

As with any mapping activity, participants highlighted "kaizen bursts," or areas of actionable improvement. "I like to think of each kaizen burst as a voice of our travelers, giving us advice as to what are the most important improvements for us to work," Winn said.

The kaizen bursts are influencing improvements in several T&ES Process Management initiatives. "The VSM showed us how we affect travelers," said Nate Seibel, T&ES manager for Lean+ and Process Excellence. "It was easy then to identify the mea-



Jim Johnson (from left), Cory Peters and Yvette Winn, leaders of Shared Services' Travel & Expense Services, work on the 84-foot (25.6-meter) long current-state map of the "book-to-pay" process, from booking a trip to making payment. RICHARD RAU/BOEING

asures that matter most and improve processes accordingly."

These improvements include:

- For incomplete online expense reports, T&ES now gives users a better view of what information is missing. Users have responded, updating information quickly. That's led to a nearly 50 percent reduction in audit cycle time, faster reimbursements and increased reconciliations.
- Starting last September, travelers began seeing an immediate online view of the required expense-report receipts they faxed to T&ES. Submittal accuracy soared to 98 percent because people who accidentally faxed illegible documents took immediate action.
- A new feature in TRIPS, Boeing's online booking system, now allows travelers to hold flight choices for about 24 hours before purchasing. Since about a third of all reservations are changed—often within the first 24 hours of purchase—this has reduced the number of canceled or unused tickets.

"Using Process Management and Six Sigma tools, we keep an eye on our operational metrics and constantly adjust. That's how we have really embedded a Lean+ approach into our processes," Seibel said. In addition, he said, many of the VSM insights were included in an upcoming major upgrade to the online expense tool, on the Boeing intranet at <http://expense.boeing.com>, that's scheduled for this year. The upgrade will further reduce expense cycle time and traveler effort.

"We care about our Boeing travelers every step of the journey," Winn said. "We must make the entire travel experience as easy as possible so they can focus on doing their business for Boeing." ■

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