

***Call Centers:***  
**Meeting the Challenges and Utilizing Technology  
to Accomplish Desired Outcomes**

**GIDGET RAMIREZ**

**EXECUTIVE SUMMARY**

Counties have begun to take a positive approach to budget challenges by implementing processes that for the most part are a generally accepted public sector phenomenon. Counties have found that by utilizing Call Center telephony along with other available technologies, there is a greater opportunity to meet budget challenges and to more efficiently serve a growing social service population.

County budget constraints may adversely impact residents in such ways as delayed receipt of needed services, inability to connect with county staff on a regular basis, and staffing resources stretched to maximum capacity. The added pressures to perform at a higher standard with limited resources impact staff morale and productivity.

The opening of Call Centers has become the latest process available for counties to meet budget

challenges and accomplish desired outcomes. Counties are utilizing a combination of Call Center telephony, document imaging, and CalWIN programming to develop streamlined workflows and increase efficiencies in their processes.

With Call Centers, counties are able to deliver important information to clients within the first few minutes of a client's call. By reducing the number of repeated and attempted contacts between staff and clients, there is a greater feeling of satisfaction on the part of both clients and staff.

With more available processing time, County staff have the ability to work on more complex case actions with reduced interruptions. Increases in overall productivity, reductions in error rates and staff turnover are expected as well.

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# ***Call Centers:*** **Meeting the Challenges and Utilizing Technology to Accomplish Desired Outcomes**

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## **Introduction**

Decreases in county budgets have increased the challenges counties face as they develop processes to meet federal, state and local mandates. Budget impacts are felt throughout county departments and have the greatest impacts on county residents living at or below the poverty level.

Increases in applications for social services in conjunction with budget constraints may adversely impact residents in such ways as delayed receipt of needed services, inability to connect with county staff on a regular basis, and staffing resources stretched to maximum capacity. The added pressures to perform at a higher standard with limited resources impact staff morale and productivity.

Counties have begun to take a positive approach to these challenges by implementing processes that are a generally accepted public sector phenomenon. Counties have found that by utilizing Call Center telephony along with other available technologies, there is a greater opportunity to handle budget challenges and to more efficiently serve a growing social service population.

The three primary technologies are: Call Center telephony, document imaging, and CalWIN programming. The scope of influence on the Call Centers is largely based upon the implementation dates of these technologies in each county.

In all counties researched, the use of these technologies has offered a new opportunity to develop processes that allow the public to receive immediate responses to a variety of inquiries by phone. In most cases the technology provides time for staff to complete case actions before a call has ended.

Counties utilizing Call Center technologies have developed workflows that are more streamlined and help to ensure that the public and other local interests are served in a more efficient manner. Counties are better able to deliver important information to clients within the first few minutes of a client's call. By reducing the number of repeated and attempted contacts between staff and clients, there is greater feeling of satisfaction on the part of both clients and staff.

With more available processing time, county staff will have the ability to work on more complex case actions with reduced interruptions. Increases in overall productivity, reductions in error rates and staff turnover are expected as well.

Call Centers are already reporting that staff retention is on a positive upswing. Counties are reporting that the tools available to staff have greatly increased morale, productivity and job satisfaction.

## **Background**

Call Centers in San Mateo, Santa Clara and Contra Costa counties have been utilizing various technologies to help meet budget constraints, the demands of increasing caseloads, and state mandated performance standards in the Medi-Cal and Food Stamps programs. In March 2006, Santa Cruz County opened a Call Center joining the list of counties seeking innovative approaches which meet state mandates while striving to keep client and staff satisfaction at a high standard.

I found that there are three main technologies that impact the overall success of a Call Center. These technologies are: Call Center telephony, docu-

ment imaging and CalWIN programming. The full scope of how each technology impacts a Call Center is largely based upon when each county began the implementation of these technologies.

Document imaging is the process that is the most time-consuming. San Mateo and Santa Clara Counties are both close to completing the imaging of all their Medi-Cal case files. Contra Costa has begun the process of imaging its case files, and Santa Cruz County will implement imaging in July 2006.

The availability of viewing an imaged document electronically while assisting a client on a phone call has proven to be a more efficient way to utilize staff time. Currently those counties that have not implemented imaging must place the caller on hold or complete a call-back to the client once the physical case file is available. By moving away from the use of a physical case file, Call Centers are able to assist clients during the initial, and sometimes only, call from a client. The time spent up front with imaging is mitigated later as clients are served with minimal follow-up required.

A major impact on Call Centers has been the implementation of CalWIN technology. Counties now recognize the need to move from a single program Call Center to a combined program Call Center. More specifically the adverse effects on a combined Medi-Cal and Food Stamps case are reduced when both cases are maintained together. The recognition for combined Call Centers provides new challenges.

As Call Centers have implemented CalWIN, each county has acted quickly and made revisions to their original workflows to meet the changing needs of clients and staff. Many Call Centers are now implementing changes to combine both Medi-Cal and Food Stamp case processing in a single location.

Incorporating the combined caseloads and evaluating different program requirements has proven challenging. Combining historically separate programs into one set of overall workflows has highlighted the need for greater communication among stakeholders that have not had to work closely together in the past.

Counties are meeting the challenges in the same manner as they first approached Call Center implementation. Counties are bringing all affected staff to the table to discuss and implement changes uniformly. Counties are meeting regularly to define similarities brought out in CalWIN and utilize available technologies to their fullest potential. This collaboration has allowed counties to overcome these new challenges with renewed energy and with a good deal of success.

### **Call Center History**

The first local Call Center opened in San Mateo County in November of 2003. San Mateo implemented document imaging in approximately September 2004 and CalWIN in October 2005. Initial caseload totals were 23,000 Medi-Cal cases. Food Stamps were added at a later date.

The second local Call Center opened in Santa Clara County in June 2004. Santa Clara implemented document imaging on July 2005 and CalWIN in June 2005. Caseload totals were 58,000 Medi-Cal cases. Food Stamp cases are not assigned to the Call Center in Santa Clara.

The third local Call Center opened in Contra Costa County in November 2005. Contra Costa implemented document imaging in June 2005 and CalWIN in August 2005. Approximate caseload totals were 36,000 Medi-Cal Cases and 4,000 Food Stamps cases.

The fourth and newest Call Center opened in Santa Cruz County on March 28, 2006. Santa Cruz County will implement document imaging in July 2006. CalWIN was implemented in May 2005. Caseload totals are 16,400 Medi-Cal and Food Stamp Ongoing Cases.

Each of the Counties worked with Intelegy Corporation to plan, develop and implement processes for a successful Call Center opening. Counties have incorporated many of the workflow processes established by the previous Call Centers into their own local processes.

Call Centers planning subcommittees have readily shared implementation plans, workflows,

challenges and successes with each other. The collaborative spirit has crossed county boundaries and provided a sense of team that continues on well after the opening of a Call Center. As each county learns more about their own technology pros and cons, they are readily sharing that information with other Call Center management. This type of information sharing and communication defines “cross county collaboration” and serves as a good model for managing other inter-county processes.

Recently the CalWIN Project has begun a workgroup for Call Centers that is designed to review CalWIN processes and make recommendations for changes that are in line with the Call Center environment.

### Recommendations

Based on the information gathered through research at Call Centers in San Mateo, Contra Costa, and Santa Clara Counties, along with my first hand knowledge of the workflow processes developed in Santa Cruz County, I would like to make the following recommendations for counties considering the utilization of Call Center technologies and processes:

- Include all stakeholders in the planning and implementation phase of Call Center development. Inclusion will help to ensure that all programs have buy-in on the Call Center’s success.
- Hire of an outside consultant to guide the process.
- Stagger timing of the implementation of Call Center telephony, document imaging and CalWIN programming. This will help to provide

staff with an opportunity to become proficient in each process before introducing new changes and ensure that each process can be fully utilized.

- Ensure input and collaboration with staff development training throughout the implementation processes to ensure that training curriculum is revised as existing and new processes are developed for the Call Center.
- Continue a modified Call Center Workflow Subcommittee for 3-6 months after the opening of a Call Center. The subcommittee ensures that processes are continuously reviewed more specifically, as newly received information such as historical call volume, overall performance and workload impacts is better understood.
- Participate on the CalWIN Call Center Workgroup. This workgroup was developed to review CalWIN processes to ensure that CalWIN changes are implemented with a Call Center environment in mind.

### Conclusion

Budget constraints have greatly impacted the ways in which counties operate on a daily basis. By utilizing private sector technologies, such as Call Center telephony, and document imaging, counties are able to implement changes that meet state and local mandates for program integrity while also increasing client and staff satisfaction. Several counties have taken on these challenges by opening Call Centers and are leading the way in the development of new strategies for operating with reduced funding.

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