

Contra Costa County's Use of Technology to Enhance Customer Experience in the District Office Lobby

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EXECUTIVE SUMMARY

In early 2010, Contra Costa County Employment and Human Services Department (EHSD) started the "Office of the Future" strategic initiative to streamline processes and implement innovative technologies to modernize and standardize practices across district offices. One outcome from this initiative was the modernization of its district office lobbies to enhance customer experience. The result was phenomenal and EHSD became a model for other counties. This case study examines the effective use of technology to support the modernized lobbies and captures their best technological practices.

The areas of technology EHSD successfully implemented to support the district office lobbies are the Nemo-Q system for lobby management, the Compass Data Capture tool for point-of-entry scanning, the self-service workstations for customers to access the My Benefits CalWIN web portal to apply for benefits online, and the courtesy phones that

connect customers to an automated phone system, allowing them to apply for or inquire about their benefits over the phone. To successfully harness the power of these technologies, EHSD leverages the concept of "less is more." To ensure a smooth adoption of these technology systems into the business process, they configured the systems with usability in mind. This means choosing simplicity over packing the systems with complex business requirements. As a result, customers and staff embrace the systems. EHSD also utilizes education and training when it comes to bringing customers on-board with systems. This strategy has enabled them to expand the usage of self-service technologies.

San Mateo County has also implemented similar technologies to enhance customer experiences in the lobbies. The practices captured in this case study are recommended areas for San Mateo County to consider for continuous improvement.

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Introduction

In recent years, there has been an emphasis among public social service agencies to streamline programs and enhance the efficiency and effectiveness of their service delivery systems. The urgency for change is brought about by the following factors: 1) years of governmental budget deficit that resulted in reductions in services coupled with an increased number of individuals and families needing assistance, 2) heightened public expectations for more accessible and efficient services as a result of advances in technology, 3) new regulations set forth by the introduction of the Patient Protection and Affordable Care Act (ACA). Both Contra Costa County Employment and Human Services Department (EHSD) and San Mateo County Human Services Department (HSA) developed plans and initiatives to improve their overall program performance through customer service. One outcome from their efforts is the implementation of innovative technologies that helped to modernize their district offices to improve services, reduce wait time, and bring consistency to customer experiences across the county. While the overall technology implementation has met the needs of the county, improvements could be made in the area of usability to improve the adoption of these systems by customers and staff. This case study examines Contra Costa County's effective use of technology to enhance lobby experiences and captures the best practices that could be leveraged by San Mateo County for continuous improvement.

Background

Well before ACA, EHSD had been looking for ways to streamline programs and enhance the efficiency and effectiveness of its service delivery systems. With the passage of the ACA in 2011, EHSD saw an opportunity to leverage what has been started as the "Office of the Future" initiative to support the ACA implementation. The "Office of the Future" goals are:

- Modernize and standardize best practices across the district offices
- Improve client experience by providing multiple access channels to obtain benefits
- Improve the working environment for EHSD staff by better managing their workload, providing new technologies, and creating streamlined processes
- Provide flexibility in ongoing operations so staff can be utilized where they are needed the most
- Leverage the time and resources expended on other major department initiatives through inclusion and coordination with the "Office of the Future" for maximum benefit to clients
- Foster and maintain a private sector business model where EHSD is competing for client business

Modernizing district offices and enhancing customer experiences in the district office lobby are critical parts of the "Office of the Future" initiative. The effective implementation of innovative technologies

at EHSD to support the different functions of the district lobby is a huge contribution to the overall success of the initiative.

Technologies Implemented to Support Lobby Experience

EHSD leverages technology to impact the customer experience in the lobby. Customer experience is influenced both directly by interacting with the technology and indirectly as county staff use the technology. The sections that follow examine EHSD's effective use of technologies in lobby management, point-of-entry document scanning, and self-service to improve customer lobby experiences.

LOBBY MANAGEMENT

One of the most notable systems implemented in the EHSD lobby is the Nemo-Q lobby line management system that manages lobby traffic. This system consists of the touch screen check-in kiosk, visual and audio notification of the next customer's turn, a web-based dashboard that allows receptionists to manage the customer's visit from their PC, and a real time monitoring and statistics interface for supervisors and managers to monitor the lobby traffic flow.

EHSD configured the kiosk check-in menu in two languages, Spanish and English. The menu selection consists of the most common services, which are:

- Scheduled Appointment
- Drop in to apply
- Drop in to see worker
- Drop off paper work
- EBT/BIC
- Pick up mail
- Other

Lobby receptionists are assigned to workstations and each workstation is responsible for providing one or more services. After a client checks in, a service request ticket gets generated and placed into a virtual queue. The receptionist who monitors the queue takes the request ticket to either handle the service request or transfer it to a different queue.

Service ticket transfers occur when a lobby supervisor sees some queues have longer lines than others and they transfer tickets to reduce wait time. After service has been provided, the receptionist closes the ticket.

The success with EHSD's lobby management tool is largely due to the simplicity of its implementation. To ensure customers can perform self-check-in at the check-in kiosk, EHSD limited the check-in menu selections to the seven most commonly used services. They made the service names succinct and easy to understand to ensure a majority of the customers can check-in without needing assistance. This also helps minimize tickets getting into the wrong service queue. The decision to track customer services up to the receptionist level helped minimize the number of virtual queues needing to be set up to track the interaction with various staff. For instance, when a customer comes in for a scheduled appointment, the ticket is closed after the receptionist has contacted the face-to-face worker who will be conducting the interview and informed them the client has arrived. Reception staff does not transfer the ticket to the face-to-face worker. With this set up, reception staff performs minimal ticket transfers between service queues; this makes the system easy to use for day-to-day operation. Simplifying the configurations of the system allows supervisors and managers to easily gather accurate reports with metrics that measure how well the lobby is doing. All of these factors allow the Nemo-Q system to contribute positively to the customer experience at EHSD lobbies.

POINT-OF-ENTRY DOCUMENT SCANNING

EHSD's goal is to move away from paper-based records and into electronic records. As such, they installed a point-of-entry scanning system, known as Compass Data Capture, to capture documents coming from various entry points. This system allows workers to scan hard-copy paper applications and verifications, such as driver's license and social security cards, into electronic images, index these images for multiple customers or case files, and make these images available instantly throughout the agency.

At EHSD, point-of-entry scanning is made available at the lobby, in the mail room, and at interview booths. Lobby receptionists scan applications and verifications that customers turn in. Intake workers scan documents directly into Compass during face-to-face interviews. Mailroom staff scan documents received through the mail. Due to the success of this system, EHSD is currently testing a self-service document scanning kiosk that would allow customers to scan their verifications without being seen by a worker.

The point-of-entry scanning system helped EHSD to improve staff efficiency. Scanning documents into an electronic format reduces time required for distribution and eliminates mishandling or loss. Since documents are made available immediately after they are scanned, the point-of-entry scanning has helped EHSD in speeding up application processing, thereby, improving customer service.

SELF-SERVICE STATION

EHSD recognizes self-service as a great way to alleviate lobby traffic and ensure faster customer service. As such, all EHSD lobbies have self-service stations. The two main technologies that EHSD implemented to support self-service are My Benefits CalWIN and Access CalWIN systems developed by the California Work Opportunity and Responsibility to Kids Information Network (CalWIN) Consortium. My Benefits CalWIN is a web portal that allows customers to check if they are eligible for benefit programs, look up benefit status and amount, apply for benefits, submit reports, and renew benefits. Access CalWIN is an automated phone system that allows customers to inquire about their benefit information. To provide ease of access to these self-service technologies, EHSD installed computer workstations equipped with printers and scanners in its lobbies that customers can use to access the My Benefits CalWIN web portal. Courtesy phones are provided in the lobby for clients to access service over the phone. EHSD has integrated Access CalWIN into its Automated Call Distributor (ACD) system so customers can access this service from the same phone number that

customers call in to apply for benefits or speak to their worker. Both My Benefits CalWIN and Access CalWIN have opened up additional access points for customers at EHSD to obtain benefits.

Installing self-service stations in the lobbies allow EHSD to effectively promote self-service. In a room full of customers waiting for their turn at the service window on a busy day, the self-service station is a great option for the impatient customers who decide to give it a try without giving up their place in line. If the experience is positive, these customers are encouraged to continue using it. At EHSD, the Lobby Greeter and receptionists are trained to help customers with any of the self-service equipment and software. Seminars are also provided from time-to-time on selected self-service topics to train customers. For instance, with My Benefits CalWIN changing to require user id and password, EHSD conducted seminars to assist people in setting up their accounts. Instructions given by reception staff at the beginning will build the foundation of how customers will seek service later on. For example, if a receptionist does not have confidence in the on-line service and customers come into the office to file a change report, then customers will always drop in to see the receptionist instead of use the on-line system. At EHSD, staff is encouraged to groom customers for self-service by imparting confidence in these services and helping them see the advantages of using them. The self-service features and supports available at EHSD lobbies serve to empower customers to obtain benefits through other means, thereby improving customer service.

Conclusion

The efficiencies that customers and staff enjoy at the lobby would not be possible without the support of innovative technologies. The reason EHSD was able to harness the power of the technologies they implemented was due to their philosophy of keeping the systems simple for both the customers and staff. This is evident in the configuration of the Nemo-Q system by simplifying the check-in menu for customers and the service queues for staff. In the area of

self-service, EHSD's approach to getting customers onboard is through education and training. EHSD's user-centric approach for technology implementation to support the lobby experience has effectively improved customer services.

Recommendations for San Mateo County Human Services Agency

San Mateo County has implemented similar technologies as EHSD to enhance its customer lobby experience and has also enjoyed some level of success. However, there are improvements that could be made in the area of usability and adoption for some of these technologies. Borrowing from the demonstrated success at EHSD, below are some recommendations for San Mateo County to consider for continuous improvement:

- Simplify the Q-Matic Lobby Management self-check-in kiosk menu, thereby, making it possible for more customers to be able to check-in without needing assistance from the Lobby Greeter.
- Reduce the number of services in Q-Matic to make the system easier for staff to use and easier for management to track customer experience at the lobby.
- Train staff in the use of My Benefits CalWIN and ACCESS CalWIN so they can encourage customers to take advantage of these self-service systems.
- Provide seminars to customers on My Benefits CalWIN and ACCESS CalWIN to increase the understanding and usage of these two systems.
- Install self-service workstations with scanners and printers in the lobbies for customers who need hands-on training in the use of My Benefits CalWIN to come in and get the help they need.

The funding for these changes should come from the program support budgets of the programs that benefit from these systems. Since the Q-Matic system is used by all clients who come in to apply, as well as those who are already in a benefit program, the cost of making changes to this system can be applied across programs based on the percentage

of staff hours spent in the regional offices for each program. Similarly, the cost of the installation of self-service workstations can be applied across the programs based on the number of applications, renewals and change reports submitted through this website for each program. The cost for training staff on My Benefits CalWIN and ACCESS CalWIN can be distributed across the programs these systems support. The return on investment for these changes would be realized through the increased utilization of self-service systems by customers as well as the improvement in wait time and customer service time in the regional office lobbies.

Acknowledgments

I would like to thank Contra Costa County for hosting and providing a comprehensive overview of the enhanced lobby experience. My deepest appreciation to:

- David Eisenlohr, Information Systems Manager, for hosting my visit and gave me tours of the EHSD lobbies as well as shared information about the technologies supporting the EHSD lobbies.
- Hoa Van, Division Manager, for hosting my visit and explaining the business processes and staffing support for the EHSD lobbies.
- Beverly Wright, Division Manager, for a great discussion of point-of-entry scanning and signature tablet concept.

I would also like to express my sincere appreciation to my home county, San Mateo County Human Services Agency

- Al David, my director, Kenneth Kong, my manager, for serving as mentors and supported me in this BASSC journey.
- Donna Woche, my BASSC liaison, for guiding and providing me with valuable feedback.
- Sue Pinto, intake supervisor at Mid-County, Drew Carter, supervisor at the Redwood City office, for spending time to explain the lobby processes to me.

Lastly, my heart-felt gratitude to my team for carrying on for me during my BASSC time and to Andrea DuBrow, Jonathan Gill, Stan Weisner, and all BASSC presenters and trainers for an unforgettable BASSC experience!

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