Improving Client Service Experience with Telephony: Contra Costa County's Service Center Telephony Solution

Gwendolyn Gill

EXECUTIVE SUMMARY

Over the last year in Solano County's Older & Disabled Adult Services Bureau (ODAS) there have been several concerns regarding the current telephone system. ODAS has a call-handler system which routes calls to various areas instead of a call center. Having to use 11 different telephone numbers, clients often complain that they cannot reach a staff member for help, they call the wrong number, or they call repeatedly. Telephone access issues not only affect clients but also staff. ODAS field social workers lament about receiving voicemails for matters that someone else could have answered. Moreover, ODAS serves mainly older and disabled adults who prefer to speak with a staff member. Based on these concerns, it is clear that the Contra Costa Service Center Telephony Solutions is a good example of an effective call center. ODAS should adopt a call center model to improve client service experience in telephone inquiries.

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Introduction

Solano County's mission is to serve the people and to provide a safe and healthy place to live, learn, work, and play. In 2017, Solano County's population was estimated to be 445,458 residents (U.S. Census, 2017). In 2017, it was estimated that Solano County Health & Social Services (H&SS) served approximately 120,429 unique clients. Telephone access is an important determinant in client access to services. There are 16 call centers within Solano County, several of which are in H&SS.

The Older and Disabled Adult Services (ODAS) bureau is one of the nine bureaus under the Health & Social Services Public Health Division. The mission of ODAS is to provide access to services and resources that sustain health and well-being, support independent lifestyles, and promote physical safety and emotional security for older and disabled adults and children in Solano County. Currently in ODAS, there are five co-located programs: Public Authority, Public Guardian, Adult Protective Services (APS), In Home Supportive Services (IHSS), and Napa Solano County Area Agency on Aging Services.

ODAS serves almost 12,000 persons annually through these services and employs 85 staff members. Based on the first quarter of 2019, ODAS is expected to receive an estimated 21,656 calls this year (County, 2019). Currently three staff members answer telephones on two of the eleven service lines. It is unclear how many calls are answered by a staff member, as the only data available is for the number of inbound calls.

Fortunately, in preparation for this case study in Contra Costa County, meetings were scheduled with ODAS leadership, the DOIT (Department of Information and Technology) Communications team, ODAS line staff, an Employment & Eligibility Manager who previously managed a call center, and a Solano County call center agent.

This case study explorse the usefulness of implementing an ODAS call center using Contra Costa County's telephony technology as an example to improve the client telephone experience. The history of call centers in county government, the definition of telephony, and Contra Costa County's telephony service is discussed first. Next, the telephone service needs of older and disabled adults are addressed. Lastly, a recommendation for Solano County ODAS is discussed.

History of Call Centers in County Government

Before county government adopted call centers in the early 2000's, businesses had been using call centers to maximize customer service since 1953, when *Life* Magazine opened the first call center to promote magazine subscriptions (SAS, 2019). A call center is a network of telephones and agents who use computerized technology in a synchronized way.

In the Bay Area, the first call centers were established in San Mateo, Santa Clara, Santa Cruz, and Contra Costa in the 2003–2006 era. This was in response to rising caseloads, budget constraints, and the need to improve efficiency in handling client calls. In addition, the state mandated performance standards in Medi-Cal and Food Stamps programs (Ramirez, 2006).

In Solano County, the first call center began in 2008 after a consultant recommended the call

center system as a solution to rising caseloads and call volume. Since then, 16 call centers have been implemented, several of which are in the H&SS area. Currently, ODAS has a call handler process which is a call selection system where a caller is provided prompts on a recording and must make a selection or be transferred to an operator.

Our Population

The ODAS client population is composed mostly of older and disabled adults who require government assistance to meet their daily needs. A significant number of clients receive IHSS, a Medi-Cal entitlement program. Most clients have limited incomes and resources. In addition, many suffer with chronic debilitating conditions, limiting both their physical and mental capabilities. A variety of psychosocial issues may abound, including social isolation, housing, food insecurity, and stress. When someone calls into ODAS, it is usually for a question about a need, program access, or other pressing question. Ideally, being able to answer the call and direct the client appropriately the first time will optimize their ODAS experience. Making access to services easier shows the client that the county cares about their well-being and how they experience county services.

Definition of Telephony

Telephony is a term used in describing the computerized services of call centers, such as those that direct your phone call to the right department at a business you're calling. Computerized telephone integration is not a new concept and has been used in the past in large telephone networks, but only dedicated call centers could justify the costs of the required equipment installation.

Contra Costa County's Medi-Cal CalFresh Service Center (MCSC) uses several telephony methods to enhance the customer experience. These include:

- Announcement of Estimated Wait Time
- Ability for Caller to select an Automated Call Back
- Caller Surveys

- Pre-recorded messages (i.e. Rights and Responsibilities for CalFresh Recipients)
- Two-tiered call agent process: simple calls routed to one agent, complex call to another

In summary, not only is the caller experience enhanced, but also data on agent call times, agent availability, and other data points can be gathered. This provides an opportunity for quality assurance and continuous quality improvement based on actual data. It increases the staff accountability for answering a call, lends to more predictable scheduling of staff on telephone assignments, and can provide a more purposeful positive experience for clients.

Contra Costa County's Telephony Service

Contra Costa is a large county with five call centers. The first call center serving Medi-Cal clients opened in Contra Costa County in 2005 due to overwhelming caseloads and the need to pool resources to meet the needs of clients. Eventually, the call center became known as the Medi-Cal CalFresh Service Center or MCSC. There have been several iterations of the MCSC, but the latest technological advances occurred in June 2017 when the leadership launched new software, inContact by NICE, to improve service to clients and improve the efficiency of the call center agents. The MCSC services 145,000 ongoing cases and is Contra Costa County's largest call center. Contra Costa County promotes a "No Wrong Door Protocol" meaning whatever call center a client reaches, the client can access all the services by the prompts. This is a coordinated effort to optimize service to the client.

The MCSC is divided into two sites: MCSC West and MCSC East. Agents are Eligibility Workers who are specialized in Medi-Cal, CalFresh, or a combination of both areas. There are 106 active call center agents assigned to the MCSC on a 60% task and 40% phone ratio for each day. Agents are assigned two telephone days per week and three task case processing days per week. On average 44 call center agents handle 352 calls daily. Each call is an

average of 17 minutes, including 10 minutes after-call work time. Approximately 15,500 calls are handled per month. Staffing the call center is based on call volume and staff availability. An Erlang Calculator is used to forecast call center staffing to meet the expected call volume.

InContact is the telephone software that supports the call center's computerized telephone integration and data collection which serves to maximize efficiency of calls, to manage call volume, and promote a positive client experience. For example, at the beginning of the call, the caller can choose their preferred language. Furthermore, the caller can choose self-service through the interactive voice recorder and is directed to the Contra Costa County website. On the www.ehsd/help website the client may email their worker, report changes to their file, upload documents, or find answers to frequently asked questions. About 60-70% of these Interactive Voice Response (IVR) self-service calls are completed, so it is an effective method to meet client needs. Once the client is connected to an agent, the agent can directly connect to an interpreter with Language Line if the client requests.

Alternatively, the caller can wait for the queue to prompt them to an agent. The system informs the caller of the estimated wait time for an agent. The caller may have the opportunity to wait, be offered a call back when an agent is available, or, if the queue is full, the caller is told the service center cannot take any more calls at the moment (called "call throttling") and instructed to call back again. Call throttling helps manage the number of calls coming in, calls in the queue, calls on hold, and callbacks. Throughout the day staff and management can view queue data including the number and type of calls waiting in the queue, which agents are logged in, how many calls have been answered, average amount of time on the calls, and the number of callbacks to be made. When the agent has data on their calls, they are more engaged and encouraged to be successful and accountable for helping as many callers as possible.

InContact supports quality assurance and continuous quality improvement in several ways. Every call is recorded, so if there is a complaint or fair hearing matter, the call can be reviewed for content. Contra Costa County supervisors review two calls per worker every month for quality assurance. Surveys are offered after every call for the client to leave feedback. This information can be gathered in a uniform format for management to review. Call center supervisors use automated reports on their staff members to refine caller services. Using data to forecast agent staffing on busy days helps improve the client experience. Data is used to give staff feedback on services, provide coaching opportunities, or identify staff who are using call avoidance techniques. At any time in the day, the supervisor can see the status of their agents, whether they are available to answer calls, on lunch, or on break and for how long.

The call center leadership structure is comprised of two Division Managers (one for each site), one Workforce Services Specialist, one Program Analyst, and one Automated Call Distribution (ACD) Coordinator. The entire team is under the administration bureau which enables the team to be successful in bridging operations with technology under one Director.

Despite the overwhelming effectiveness of the call center's telephony services, there are a few challenges. Data consistently shows that more call agents are needed on the telephones to handle increasing numbers of clients. Caseloads are more complex and tasks continue to rise. Fortunately, the VOICE team continues to review technology to maximize call efficiency so the agent can ideally answer more calls.

Recommendation

After learning about Contra Costa County's telephony services, it seems clear that Solano County can benefit from a call center in ODAS to improve our clients' experience. While the inContact telephony software is quite impressive, Solano County used Cisco Unified Contact Center Express. ODAS would have to adopt this platform for uniformity and to minimize additional costs.

Steps to Implementation

1. Survey staff and clients about client telephone experience – pre/post markers.

2. Identify five staff members who will be part-time call center agents.

3. Request budget adjustment for a .5 FTE Project Coordinator. Essential duties are similar to the Contra Costa's Automated Call Distribution Coordinator and include:
   - Update current self-service features (interactive voice response and interactive web response platforms).
   - Mediate between DOIT (county technology group) and operations.
   - Train staff, day-to-day call enter support;
   - Troubleshoot call center issues such as technical problems or report discrepancies.
   - Arrange schedule for call center agents per Erlang Calculator.

4. Discuss project with supervisors and assess their capacity to supervise their staff's call center work.

5. Identify an experienced Solano County Call Center Manager as a resource.

6. Project Coordinator develops the training script for frequently asked questions.

7. Identify staff training needs including customer service and other necessary software.

8. Submit DOIT request for Call Center Implementation which includes the seven steps below:
   1. Communications technician will interview the group for requirements.
   2. An interim script will be created based on the interview.
   3. A test call center will be created with a test number in the sandbox.
   4. The requesting group will validate the script.
   5. The cut-over will be planned by the Communications technician.
   6. Cut-over will be completed.
   7. Communications technician will work with requesting group to monitor.

9. Have ongoing monthly meetings with the project coordinator, supervisors, DOIT, and staff to refine the process and continually monitor quality assurance and quality improvement needs.

10. Budget – Minimal costs for project are outlined below.

    Hire Project Coordinator $55,200
        (replacing a .5 FTE salary position)
    Web Development . . . . $ 5,000
    IVR/IWR Enhancements . . . . $ 5,000
    Total Cost $65,200

The assumption is that current ODAS office assistants have capacity to share telephone support.

In conclusion, the ODAS client experience will be enhanced by converting to a call center format similar to the Contra Costa County Service Center Telephony Solution. Solano County will be able to monitor and measure call volume and improve staff accountability and efficiency with answering our clients' inquiries.

Acknowledgements

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