Customer Experience 2.0 and Technology Lead the Way into the Twenty-First Century in Santa Cruz County

Jerry Kulper

EXECUTIVE SUMMARY

Similar to all social services agencies, Monterey County Department of Social Services (MCDSS) strives to do three things: deliver quality customer service, ensure customers receive the benefits they are eligible to receive, and treat everyone in a respectful, courteous and expeditious manner. As MCDSS moves deeper into the 21st century, it looks to enhance the delivery of these components in a more efficient manner.

This case study began with visits to Alameda County (BASSC half day project), and Santa Cruz County (BASSC 15 day internship). The focus of this study is assess the technology Santa Cruz County has implemented to develop lobby kiosks and a Task Tracker system. The study also included a high level review of Customer Experience 2.0 (CX2.0) inSanta Cruz County.

Visits to both counties were very informative in how new technology can be utilized to efficiently serve customers and move them through the lobby with minimal disturbance to both customer and staff. This case study reviews the technological tools housed within the C-IV kiosk and FACT wireless tablet, the use ofof manually designed materials (e.g., posters, flyers, office procedure documents, etc.) and training sessions for MCDSS staff. The CX2.0 service delivery is reviewed as well to ensure that the "soft skills" of customer interaction and satisfaction are not lost when introducing technology tools.

The time has come for MCDSS to fully step into the 21st century by enhancing its customer service models. Customer service can be enhanced when folding technology into the 'soft skill sets' that staff already possess.

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Introduction

The goal is to utilize the C-IV kiosk option for Monterey County to allow customers virtually the same accessibility; check-in for an appointment, request a new Electronic Benefit Transfer/Beneficiary Identification Card (EBT/BIC), and image documents (and request a receipt). Customers may use their time more efficiently when visiting the office, as well as eligibility staff involved, as they will receive an alert and seamlessly access and process important documentation. The county has purchased and is moving forward with kiosk installation and is in the midst of preparing for this exciting new chapter in customer service delivery. These new tools and enhancements to a customer service model will assist both customers and eligibility staff in the near future.

Introduction—Santa Cruz and Customer Experience 2.0 (CX2.0)

When federal health care reform was passed into law, and the many subsequent opportunities and challenges came along with it, Santa Cruz County took this task head-on with an aggressive, strategic customer service program utilizing both private and public sector models. Santa Cruz rolled out CX2.0 in November 2014 in a series of trainings and system enhancements so that its staff could better serve their customer base. With the WE CARE model, the staff Welcomes, Engages, Communicates, Addresses, Resolves, and Ends each interaction with customers on a positive note (Santa Cruz County Human Services Department).

The Santa Cruz County model folds in new technologies that included kiosks, the Task Tracker system (for work assignments), modernized lobby enhancements (charging stations, etc.), and an updated Human Services webpage. It also included training across all classifications in eligibility and clerical aimed at reinvigorating and enhancing "soft-skills" among all human services staff. This enhancement in the delivery of customer service in Santa Cruz County was driven by the need for "holistic assessments" and "horizontal integration," an interactive approach driven by the Affordable Care Act (ACA), the desire to provide excellent customer service, and other variables.

Staff received in-depth refresher training on the following subjects: in person and phone interviews and utilizing the kiosk and Task Tracker systems. There was also an effort to standardize the dissemination of office policies and procedures to ensure that all staff receive clear and concise messaging. The classification of the Eligibility Workers I, II, and III was a negotiated change to Benefits Representatives so staff could be flexible and interchangeable in their duties and assignments. This new and exciting view of customer service in Santa Cruz County looks to be full of promise!

As a customer base grows there is always a need to reflect, review, and revise how customer

service is delivered. Its aim is to move a customer through a business/provider/entity with ease and efficiency as the overarching goal. The simplicity in which a customer accesses any service allows for two things: satisfied customer, and efficient business transactions.

Statement of Need—Monterey County

Monterey County Department of Social Services (MCDSS) has grown its overall customer caseload base by 57% since 2001, according to the Borgeson reports (2001-2015). Monterey has seen exponential growth, both in population and caseload sizes over the last 15 years due to a myriad of factors: program expansion, outreach efforts, economic downturns, and the ACA. Monterey County's population, as of 2014, is approximately 430,000 with the cultural breakdown as follows: Hispanic 56.8%, Caucasian 31.6%, African American 3.6%, Asian. 6.9%, and other 1.1% (U.S. Census). Since 2001, Medi-Cal caseloads have jumped 100%.

This increase in the customer base (caseload sizes) has MCDSS reviewing current office policies and procedures that have been in effect for many years, as well as technological advances with C-IV, to determine how to better serve its customers.

With this rapid growth in cases and static staffing, there is a definite need to enhance the customer experience when visiting any of the three district offices in Monterey County, of which each has its own very unique customer needs.

Background-MCDSS Demographics

The MCDSS Salinas District Office is in The Life Foundation Building, a facility that houses the Salinas Community Benefits Branch and approximately 500 staff. On average, approximately 550 Community Benefits customers per day come through a single lobby in Salinas to request services from a multitude of options: applying for benefits, requesting to see a worker, supervisor, or manager, dropping off requested verifications, coming in for an interview, etc. To meet the demands of this increased customer base and deliver these services in an efficient and timely manner, the Salinas District Office is in the planning stages of a progressive lobby remodel and redesign. Initial implementation, phase one, will begin with a C-IV Kiosk system in the Salinas and Seaside Offices, and the King City Office will utilize a wireless tablet (FACT).

October 1, 2015 is the target date for implementation in all locations.

What Does The Future Look Like?

Monterey County is a member of the C-IV Consortium, and there are some new tools available to counties within the Consortium to assist customers. They are the C-IV Kiosk and the FACT Tablet. The C-IV

FIGURE 1
Monterey County Caseload Growth 2001–2015
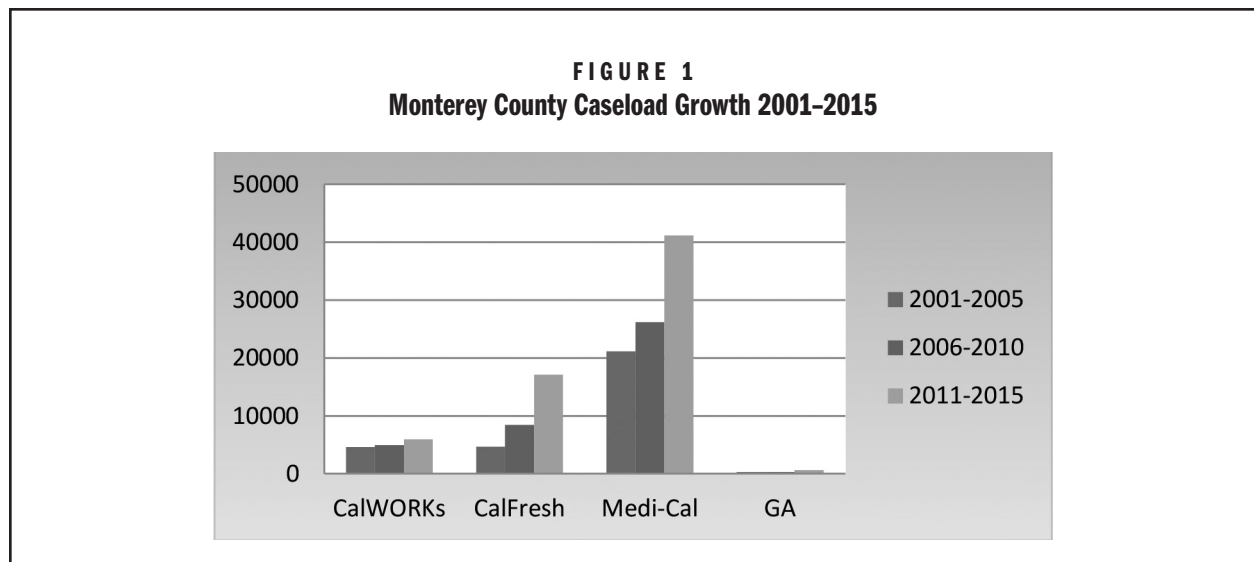
Kiosks are designed to scan documents (12 Options), obtain receipts, allow customer appointment check-in's with automatic alert sent to EW in C-IV message center, pick-up items (EBT Cards, BIC's, etc.), and generate management reports.

Alameda County's experience with a kiosk has beenintegral in reducing lobby traffic for customers delivering documents for imaging. In the month of November 2014 there were a total of 2,522 receipts issued; however, the kiosks printed the bulk, at 2,291, so the lobby flow was very manageable. This is what Monterey County is hoping to achieve with kiosk use. The C-IV FACT Tablets are designed to allow benefits staff to check-in customers via a wireless network connection to the C-IV system.

Gantt Chart and Costs for Project

Cost for each kiosk is approximately $22,000 for the initial purchase (C-IV), software, and tech support for installation and implementation support. Monterey County's investment is $88,000 to roll out kiosks in two of three district offices. Cost for a FACT tablet is $3,800 (C-IV). This piece of technology will be utilized in the King City District Office. There are planned visits to Santa Cruz County to view its lobby/technology changes. A visit to a C-IV county with kiosks currently in use is also being scheduled to meet management and staff. In May, Site Prep, Communication, and Change Management workgroups will be convened and assigned specific tasks and deadlines for completion of each. Customers will be sent mailers/flyers regarding the coming changes to local

MCDSS lobbies starting in July. Posters and communication letters will also be issued in lobbies and suites announcing the upcoming changes to staff and that they will be rolled out concurrently. Training commences in September for all staff for new technology and office procedural changes. A make-up session will be scheduled as well. September entails lobby remodel and installations. It is scheduled to go live on October 1st.

FIGURE 2
Implementation Timeline for C-IV Kiosk System
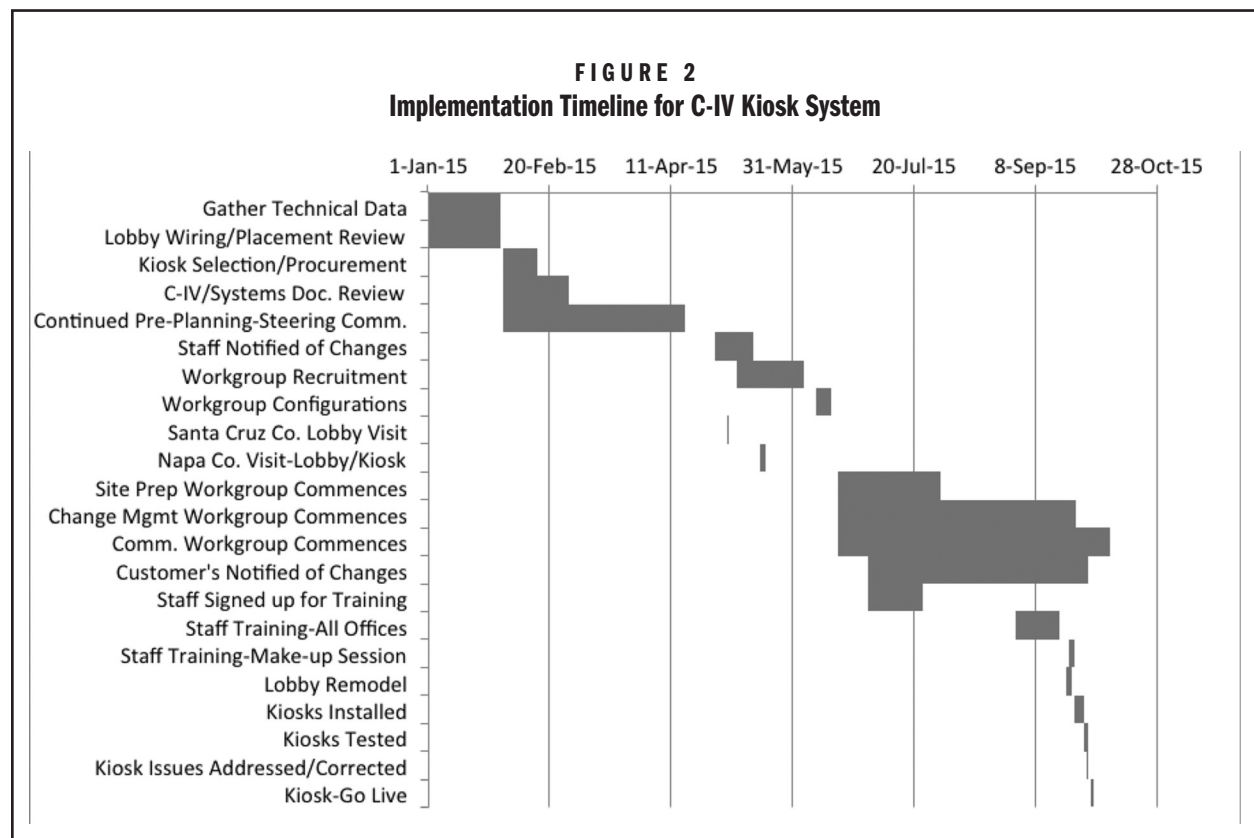
Workgroups Start in May 2015

The C-IV Kiosk system has multiple tools that enhance customer service as well as assist eligibility staff carry out their job duties in a more efficient manner. The C-IV tablet has will be utilized to assist customers in moving through the office in an efficient manner. Some of the components of the Santa Cruz Customer Experience 2.0 will be reviewed and possibly implemented. All workgroups will confirm progress and ensure the timeline is in place and viable. There will also be opportunity to getfeedback, discuss challenges, and dialogue re. solutions. All proposed changes will go through the Steering Committee for review and final approval.

To prepare for kiosk implementation, there are multiple tasks that must be completed;

- **Site Preparations**
  - ▫ Secure kiosks for lobby via Finance and C-IV coordination.
  - ▫ Convene a Site Prep workgroup of effected staff (Eligibility, Clerical, and Management) for input and coordination/implementation.
  - ▫ Ensure wiring and installation is completed in a timely manner (e.g., data lines, power).
  - ▫ Keep open communication with Systems Support staff in preparation for delivery and installation.

- **Change Management**
  - ▫ Design and convene a workgroup to review specific office procedures affected by this enhanced business model to propose thoughtful changes in regards to customer service, both internal and external.
  - ▫ Address changes in customer service models and examine new procedural changes that are to be reviewed/written/submitted for approval. Input will be received from all levels of staff to design this training.
  - ▫ Train all staff, with a focus on a new customer service delivery model, utilizing technology and enhanced "soft skills."

  - ▫ Incorporate the new customer service model into all new induction training.

- **Communications**
  - ▫ Design and convene a workgroup with a focus on:
    - ~ Informing staff of coming changes for lobby and customer service delivery (e.g. poster, flyers, weekly/monthly bulletin).
    - ~ Informing customers of the coming change in the lobby and communication interactions with clerical and eligibility staff.
      - · Lobby posters, possible stuffers with RE's and SAR mailers.
      - · Customer survey, pre-post implementation. This would potentially be for both staff (internal) and customers (external).

Implementation of New Technology and Customer Service Delivery Models

The Site Prep group is tasked with a lobby review and selection for locations for kiosks. Placement will be partially based on current lobby configuration, as a full lobby redesign is a few years away and the placement of kiosks in customer-familiar locations in each lobby is imperative. Santa Cruz has its kiosk at the Beach Street location immediately inside the entrance doors for ease of access. Currently, in the Salinas office, when customers enter the lobby they are directed by signage and customer flow cordons and ropes into a line where they check in with a greeter and let staff know what their visit is in regards to (e.g. submitting documents for imaging, checking in to see their worker for an appointment, coming in as a drop-in with no appointment, etc.). The same flow is maintained for customers except they end up at a kiosk (with clerical staff there to assist using the kiosk). This will make the process a little more comfortable with the process for customers and enable them to efficiently access their own cases with relative ease (with staff assistance as

needed to image documents, contact their worker, etc.). Again, some of the customer base is comfortable with technology, some not so much, so staff assistance will be imperative.

Coinciding with Site Prep work, the Communication Workgroup will begin devising strategies to inform staff and customers of the coming changes in lobby communication. Early communications to staff will be helped with posters in all suites announcing the kiosks at their locations. There will be details on the posters, including the different tools within each kiosk and how customers will need to utilize them to communicate with their worker. The Communication team will also be tasked with designing flyers to "piggyback" with general mass mailings of renewal packets and SAR 7's, so all customers will receive notice prior to implementation.

The Change Management workgroup will be tasked with reviewing all internal procedural documents that will be effected by this new technological tool. Each effected procedural document will be reviewed and revised as needed and then approved by the appropriate manager.

Follow-up

From the initial day of implementation (for the first week), there will be daily d-briefings between the offices: conference calls to discuss the day, any issues that arose, what worked well, and not so well. It is realistic to assume there may be components that were not reviewed or revised due to oversight. If something is missed, it will be reviewed and a procedure will be written or updated to handle the change. It is the hope that the Change Management workgroup would have reviewed and anticipated any possible scenarios in preparation for implementation. The Communication workgroup will review and compile a summary report of the customer surveys, including the pros and cons of implementation and ongoing use. Input from both customer segments (internal and external) will be taken into consideration as much as possible and utilized where deemed to be an effective change.

Potential Barriers

Clear and concise training and procedures for staff selected to assist customers in kiosk use will be critical. MCDSS would need to ensure the kiosks do not add layers of unintended complexity to the lobby experiences of its customers. Customers will need to feel comfortable with new technology, comfortable enough to utilize it on a consistent basis. This may take multiple visits and assistance for some, depending upon technical sophistication. Kiosks will need to be cost effective for the county—anticipating costs from securing the kiosk(s), set-up (i.e. safe/prominent location, wiring, etc.), maintenance of kiosks, training for staff used to assist

customers, and paper used for receipts. Customers will have enough available options to stem the flow to the reception area, therefore, allowing other customers not needing kiosk assistance to quickly flow through the rest of the reception area, keeping their time waiting manageable, as well as lobby/reception sound levels low. Language and/or literacy barriers for customers may be challenges navigating automated systems. Implementation of the kiosks will be a challenge for some as well as the staff who will assist them. Additional care will be taken to select the appropriate staff who have the necessary bilingual and soft skills to make this transition smooth for all customers.

Potential Benefits

The C-IV kiosk system has options to upload documents, upload bar-coded documents, issue receipts; check-in for appointments, and message a worker; it also generates various management reports (e.g., number of daily visits, types of visits, etc.). In 2014 the Salinas office had a daily average of 420 customers per day, of those, 140 brought documents to be imaged. With the kiosk, this would equate to a 35% decrease in customers having to go through the full reception/lobby flow. Also, an average of 95 customers a day are dropping in with no appointments to see their workers; this would equate to a 23% reduction in reception/lobby if they just logged in to see

their worker, again, instead of going through the full reception flow. Overall, implementation of kiosks in the Salinas office would enhance the customer experience by quickly and efficiently providing each customer prompt access and completion of his or her MCDSS transactions.

Recommendations

With the purchase in place for the new technology, Monterey County is halfway to bringing this new version of customer service to the residents of the county. In utilizing the new

C-IV technology through kiosks and the FACT tablet, along with select pieces of the Santa Cruz Customer Experience 2.0, Monterey County will be able to assist all customers in a more efficient manner. The Santa Cruz Customer Experience 2.0 procedures have many valuable and strategic components to take into consideration, especially for the Change Management workgroup. These components will be reviewed and researched in-depth in the near future, as the county moves closer to full lobby redesign and customer service enhancements.

As customers and staff settle in to the new technologies implemented in Monterey County in early Fall 2015, there will be continued review and tracking of all newly implemented and revised policies and procedures. This will ensure a 21st century lobby and customer service delivery.

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