

# Santa Cruz County Human Services Department's Customer Experience 2.0: A Comprehensive Approach to Re-Tooling and Delivering a World-Class Customer Service Experience

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## EXECUTIVE SUMMARY

*“With the federal Health Care Reform’s new opportunities and requirements as impetus, the County of Santa Cruz Human Services Department (SCHSD) embarked upon a strategic, yet aggressive, effort to make its provision of customer service both standardized and exceptional. This effort, known as Customer Service 2.0 (CX2.0), builds on existing internal customer service models, and enhances and builds consistency in customers’ interactions with our staff, facilities, technology and written materials. As part of the CX2.0 initiative, the SCHSD developed a new customer experience service model called We Care, which focuses on customers feeling welcomed, informed, respected and empowered while receiving the assistance they need.*

*Inspired by leading private sector models, We Care ensures customers gain access to a wide range of services including healthcare, nutritional assistance, cash aid, and employment and training in a comfortable, timely, and effective manner”*

—Stewart, A., and Petersen, K. 2014

This case study looks at Santa Cruz County’s Human Services Department’s approaches and its design to create a culture of change by addressing a complex cross-division initiative that integrates all aspects of communications and technologies for services through the lens of the customer’s experience.

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## Introduction

Service Excellence is one of Alameda County Social Services Agency's (ACSSA) initiatives. The agency is currently exploring new ideas and ways in how to enhance customer service for both internal and external customers.

Effective October 1, 2013, Alameda County implemented Health Care Reform (HCR) provisions outlined in the Affordable Care Act (ACA) and began to pre-enroll individuals for all coverage options that they are eligible for.

## ACSSA's "No Wrong Door" Policy

The goal of HCR is to promote a "No Wrong Door Policy," which:

1. provides first-class customer service that is responsive, friendly, timely, accurate service provided in the individual's preferred manner (in person, online, by phone or via mail)
2. ensures individual enrollment in all available coverage and no longer asks the question of "Who is eligible?" or "What is the individual eligible for?" and
3. coordinates services so that individuals and families have the opportunity to apply for other services (e.g., CalFresh, CalWORKs, General Assistance (GA) and offer programs that are coordinated so that applicants do not need to repeat or provide the same information to multiple entities.

County offices have dedicated staff to assist residents who come to SSA offices asking for assistance enrolling in Medi-Cal or the exchange. Alameda County also dedicated one ACA Intake Unit of Eligibility Technician IIIs (ET IIIs) in each of the four social services offices to support the applications from various portals. The ET III ACA units are responsible for processing Modified Adjusted Gross Income (MAGI), Medi-Cal, and Advanced Premium Tax Credit (APTC) applications as well as applications for other coordinated services including CalFresh and GA walk-ins.

The Customer Service Telephone Center (CSTC) within The Department of Adult, Aging and Medi-Cal Services (AAMS) continues to have staff available during open enrollment hours to assist those who call Covered CA for assistance and are deemed eligible for Medi-Cal. Staff also process backlogged Medi-Cal applications and field calls from county Medi-Cal clients who call Covered CA for assistance (Alameda County, October 2013).

The SCHSD developed the *We Care* model following the county's implementation of the Affordable Care Act, the most significant expansion of health care since the creation of Medicare and Medicaid in 1965. The nearly unprecedented volume of new customers gave the county the opportunity to evaluate all facets of the customer experience, resulting in the conclusion that while county professionals were delivering to the highest level of service in the

existing model, there was an opportunity to introduce a new model. The county responded by reengineering every component of the customer experience and providing dedicated county employees with new tools to support customers (SCHSD, *We Care* Description, July 2014).

### **Background of *We Care***

With the implementation of the Affordable Care Act, and the years that followed with increased service demands and decreased staffing, SCHSD recognized the need to have a flexible workforce and technology that would facilitate workload management. The county reclassified all of its level I and II Eligibility Workers to one classification of Benefits Representative (BR). BR could do any type of intake or ongoing casework without job classification restrictions.

*We Care*, the County of Santa Cruz Human Services Department's new customer experience service model, focuses on customers feeling welcomed, informed, respected and empowered while receiving the assistance they need. Inspired by leading private sector models, *We Care* ensures customers gain access to a wide range of services, including health care, nutritional assistance, cash aid, and employment and training, in a comfortable, timely, and effective manner.

The *We Care* model is delivered by highly motivated professional Benefits Representatives (BR), Employment Training Specialists, and Support Staff dedicated to creating positive relationships with customers while connecting them to resources and services whether in person, by phone, via kiosk or online. Every customer interaction is backed by a commitment to exceptional services (Stewart, A., and Petersen, K. 2014).

### **Goals – Enhancing the Customer Experience**

The Santa Cruz County Employment and Benefit Services Division (EBSD) improved customer service by designing the business model for administering public benefits including streamlining processes and introducing new technologies. "... to support the new

service model, SCHSD instituted Task Tracker – a Task Management application, and created a 'check-in kiosk' from the ground up..." (SCHSD, the H Files, January 2014).

### **CX 2.0 Steering Committee**

The Santa Cruz EBSD CX 2.0 Steering Committee consists of key leaders and managers. It includes the Director, Deputy Director, Administrator/Director, IT Director, Planning and Evaluation Director, Public Information Officer, Program Managers, Program Analysts, and the Development Consultant. They are charged to plan and implement many critical action items, such as: facilities, training (business processes and working on developing scripts for trainings and video production), technology, policies, and operations (clerical and Benefits Representative's script/workflow).

In addition to the steering committee, there are other workgroups in progress (e.g., Case Processing, Using the Work Step Report for Staff's Feedback/Improvement, and Template). Each workgroup consists of supervisors and Benefits Representatives (BR) from each site of the four offices in the county. The workgroups will address and develop a consistent understanding and application of the service delivery model's approaches across offices and staff.

### **Implementations and Key Elements**

#### **ROLE OF A BENEFIT REPRESENTATIVE:**

The Employment and Benefit Services Division (EBSD) supports the Human Services Department's mission by providing vital benefits and services such as food assistance, health care benefits, cash assistance, and employment services. Benefits Representatives have a critical role in determining initial and continuing eligibility for individuals and families. EBSD's goal is to consistently provide a "world-class customer experience" by ensuring both internal and external customers feel welcomed and comfortable, heard and supported, accepted and respected, and informed and empowered.

**OPERATIONAL FRAMEWORK:**

The Operational Framework illustrates the four components of a customer's contact with the Department of Human Services:

- Customers have three basic needs: food, medical care, and/or cash aid.
- Cases fall into two categories: new application or existing case. Customers are attempting to obtain and keep benefits as long as they are eligible.
- There are three venues where customers will interact: in-person, on the phone, or via the Benefits Cal-WIN website.

There are three outcomes a customer may experience: the individual may be approved/renewed, denied/discontinued, or in a pending status that requires additional verifications. Regardless of the customer's status, he or she may be referred for additional services.

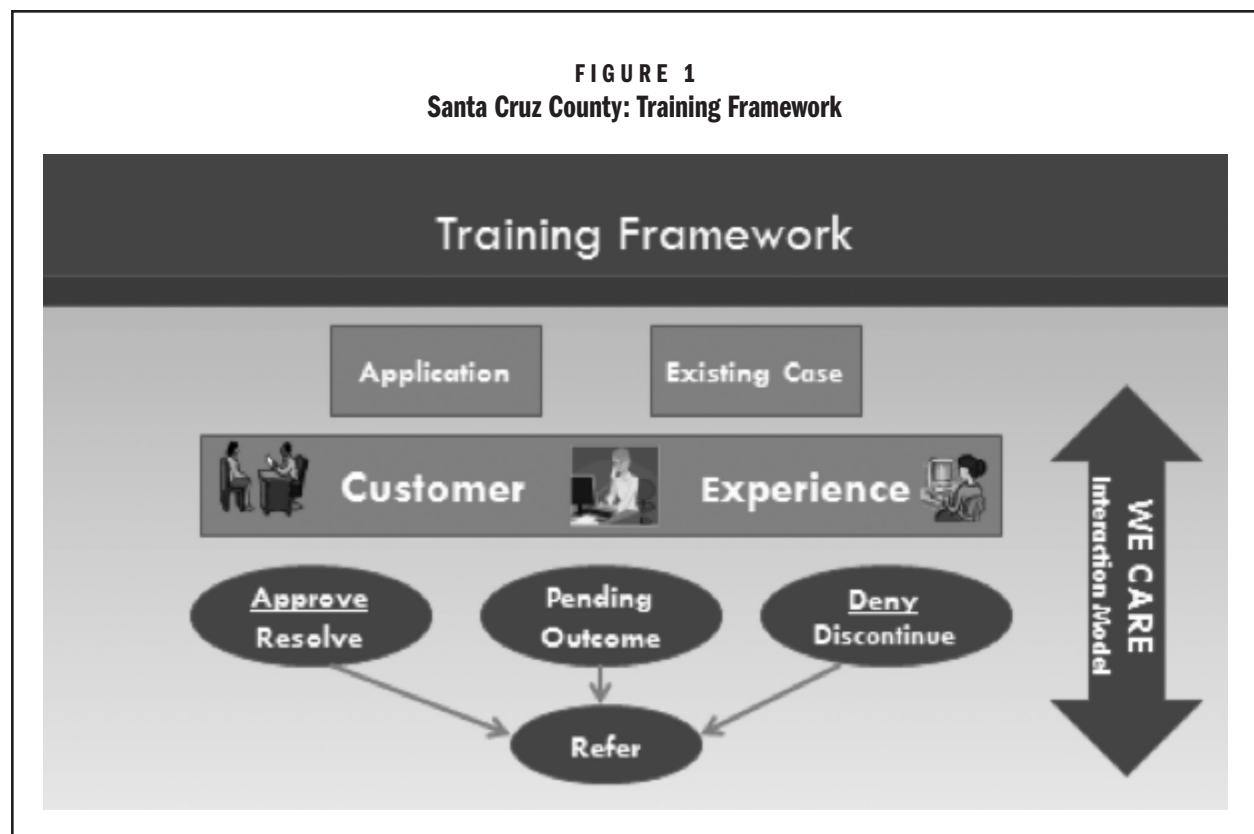
**Trainings: We Care Interaction Model**

See *Figure 1* and *Figure 2*.

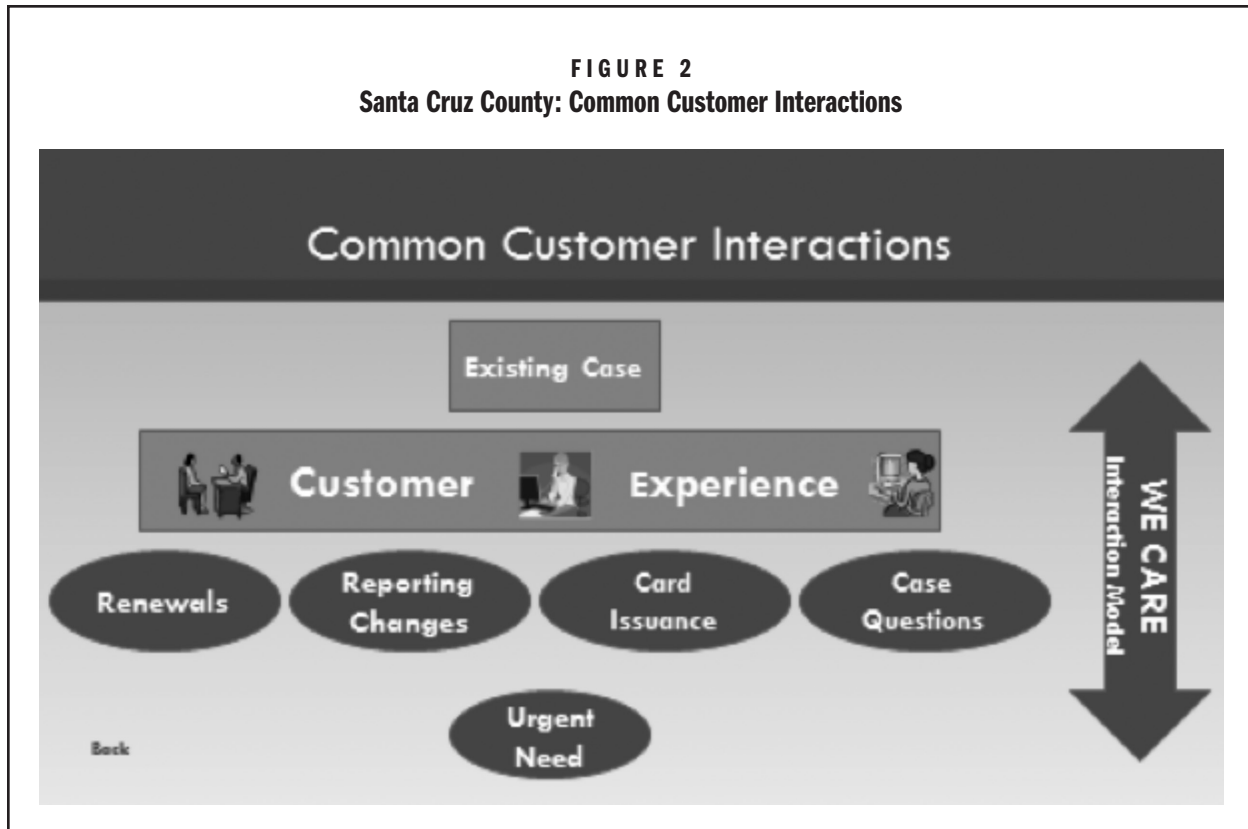
**What is We Care?**

*We Care* is a customer service model designed to deliver a world-class customer service experience of public assistance programs in Santa Cruz County. This is done through the effective application of cultural awareness, operating knowledge of technology, and defining and embracing the customers' satisfaction of services and referrals throughout their experiences with the Human Services Department. Through the effective use of *We Care* for phone contacts and face-to-face interactions, Benefit Representatives will accomplish a uniform customer service delivery experience that leads to positive customer experience outcomes, customer satisfaction, and access to effective and caring service (SCHSD, *We Care* Facilitator Guide Text, February, 2015).

**FIGURE 1**  
**Santa Cruz County: Training Framework**



**FIGURE 2**  
**Santa Cruz County: Common Customer Interactions**



### How We Care Works?

*We Care* provides a consistent level of service by:

- developing customer service standards with input from all levels of staff
- identifying the conversation flow sequencing, from introduction to closing
- reflecting Santa Cruz County standards and principles throughout the conversation flow
- measuring and assessing the level of services being provided through Quality Assurance call reviews, face-to-face reviews, and key performance indicators

### The 6 Stages of *We Care* are:

Welcome and Personalized Greeting  
 Engage and Clarify Expectations  
 Communicate and Gather Information  
 Address Customer Needs  
 Resolve Questions and Concerns  
 End on a Positive Note

**Welcome and Personalized Greeting** includes two steps:

- Welcome/greet the customer
- Personalize the conversation and set the expectation

**Engage and Clarify Expectations** includes four steps:

- Confirm the reason for the customer's call or office visit
- Confirm customer's personal and household information
- Set meeting/conversation expectations
- Explain horizontal integration

**Communicate and Gather Information** includes four steps:

- Identify customer's needs
- Gather information/review case comments
- Complete applications/tasks
- Confirm personal information



**Address Customer Needs** includes three steps:

- Determine possible program eligibility
- Explain status/timeliness/case updates
- Provide additional options/ referrals to help meet the customer's needs

**Resolve Questions and Concerns** includes three steps:

- Verify understanding of status and next steps
- Address questions and concerns
- Confirm customer's needs have been addressed

**End on a Positive Note** includes two steps:

- Provide information for future HSD contact  
Thank them for his/her time

## Conclusion

Currently, the *We Care* model being used by the Santa Cruz County is effective in meeting its goals of improved customer service and keeping customers informed and empowered while receiving public assistance. Based on observation, the waiting room area is welcoming; staff is friendly; customers were served quickly; and information is readily available. Interviews were conducted in private rooms painted in calming colors and garnished with agency appropriate décor, including: the HSD mission statement, a copy of the high level WE CARE steps, images of families on the wall, and a desk set up all on one level—intended to help customers feel accepted and respected by BR. Different language needs are addressed by appropriate staff. There is “Unit Role Rotation” on a monthly basis for Face-to-Face (F2F), Processing, and Special Operation teams. BRs know their operational principles for rotations. Staff is also benefited by this model; they appear to know the overall directions of *We Care* interaction steps.

## Recommendations

Based on this case study of Santa Cruz County's “Customer Experience 2.0 & *We Care* Model”, it was learned that the Benefits Representatives (BR) can do any type of intake or ongoing casework without job classification restrictions.

In Alameda County Social Services Agency (ACSSA), the Eligibility Technician III (ET III) is a non-yardstick job classification for all aid programs. The ET III should be able to perform any type of intake or ongoing caseloads with the same flexibility as a BR in Santa Cruz County.

Therefore, I would like to recommend that Alameda County Social Services Agency explore the following options:

- Promote horizontal integration and the importance of enrollment in all eligible benefits by allowing Eligibility Technician IIIs, especially for SSA's Outreach Intake Mobile staff, to do any type of intake or ongoing casework—moving the community/clinic culture away from just health insurance enrollment.
- Establish SSA's Mobile District Outreach workers to improve customer service and support renewals and retention by allowing hands-on assistance and in-person relationship building with clients at on-site locations.
- Implement technology integrations:
  - Allow all ET III staff to have greater access to be able to perform eligibility tasks both in the district offices and in the field for all aid programs.
  - Every ET III staff should have the security access and ability to work on their intake or ongoing cases in CalWIN, CalHEERS, MEDS, and Web files without restrictions.
  - Streamline the process of auto-filled case comments (template) in CalWIN for actions taken by Eligibility Technicians (such as: income changes, adding a person, or change of address). This will enhance customer service for both new applications and renewals.
- Institute training and develop more customer service's tools and written materials/resources (script/workflow) for staff.

This will improve and strengthen ACSSA's service delivery and relationship with customers and community partners.

## Acknowledgments

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