Mindset, Innovation, Empathy and Excellent Customer Service Delivery

San Francisco Human Services Agency's Innovation Office

Eileen Olson

EXECUTIVE SUMMARY

Service Design is an approach to programmatic improvements that integrates the use of various methodologies to raise the performance of an organization through an end-to-end design of the human experience. The City and County of San Francisco's Human Services Agency (HSA) recently used the Service Design approach to design and facilitate successful changes to its organization that has resulted in performance and experience improvements for agency customers and staff. The Service Design approach aligns with the strategic direction of Contra Costa County's Employment and Human Services Department (EHSD) due to the shared focus on customer satisfaction and process improvement and performance. The implementation of a Service Design approach at EHSD would likely lead to similar performance improvements as those realized at HSA.

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Introduction

Change is inevitable in every organization and customers, staff, and processes are impacted by these changes. On one side, organizations are subjected to budget fluctuations, staff turnover, legislative mandates, and other factors. At the same time, they are also faced with higher service delivery expectations from customers who are now more comfortable than ever with technology and are exposed every day to services that provide immediate response such as online banking and DMV self-service. Whether customers are accessing services through the Internet or while visiting an office, customers expect fast, convenient, accessible, and streamlined services.

To meet these challenges, organizations are developing strategies and launching performance improvement initiatives. Contra Costa County's Employment and Human Services Department (EHSD) has identified customer service, staff retention, improved processes, and the deployment of new technology as strategic priorities to fulfill its mission.

The City and County of San Francisco's Human Services Agency (HSA) has similar strategic objectives and has gone on to address them by establishing an Innovation Office. Within the Innovation Office, HSA adopted Service Design to transform customer and staff experience and process interactions and improve organizational performance. The Innovation Office utilizes a set of tools and methodologies, among them, Lean Process Improvement and Human Centered

Design, to design end-to-end service processes that focus on human interaction and high performance.

Service Design is geared towards understanding, using, and encouraging the use of effective and efficient problem solving methods and creative approaches to meet the needs of those being served. One aim of Service Design is to change the organization's mindset by activating a culture shift that instills continuous improvement as an integral aspect of the work.

Many organizations are successfully using Service Design to improve business processes. One such organization is the city of Denver, Colorado. Denver successfully used Lean in its innovation initiatives through a program called Denver Peak Academy. The program is *"designed to help frontline government employees innovate in their jobs — without getting more money or new technology."*[1] As part of the Innovation Office implementation, HSA received the one-week, Black Belt Lean methodologies used by Denver to effect change and increase performance in its business units. HSA created its own hybrid model of Lean by combining it with Human-Centered Design and other techniques described below.

Service Design Alignment with EHSD's Mission and Strategic Initiatives

The Service Design model is a customer-centric approach using an array of tools and methodologies to design business processes around an understanding of the needs of participants to enhance their experiences and ensure that the processes are performing well and providing value. People (all stakeholders, including customers, staff, and others), processes (external

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[1] Westword Website "How Peak Performance is Taking Over Denver Employees"; by Laura Shunk, November 22, 2016

customer facing and back office internal process), and touchpoints (e.g., customer lobbies, websites, email, postal mail, etc.) are integrated to deliver efficient and effective service. Touchpoints are made easier and more accessible by focusing on the needs of clients as well as employees. Having deep empathy for clients' daily pain points and enabling front line staff to experiment with improvements, lead to measurable change. These changes may include eliminating unnecessary activities.

When comparing the objectives of Service Design with EHSD's mission, vision, and values, the alignment of the two are readily apparent. EHSD's mission is to deliver quality services to ensure access to resources that support and empower individuals to achieve self-sufficiency. Its core values are to provide exceptional customer experience, be responsive, respectful and appreciative of staff and their efforts, readily embrace change, to be strategic thinkers and to look towards innovation and technology.

EHSD has continually looked for ways to improve its business model. Through the years, EHSD has implemented a range of service delivery projects and business process improvement initiatives. Examples include video conferencing, call centers, texting, websites, lobby management, kiosks and other customer centric and process improvement projects that have been put in place.

Additionally, various strategic initiatives and work plans have been developed to support EHSD goals and are still being used to foster process improvement. One strategic initiative is the pursuit of the highest level of customer service in all programs and offices. Another important strategy is the leveraging of technology to support business process improvement with an emphasis on customer-facing, automated solutions that improve service delivery and increase efficiencies

with the needs of customers in mind. Recently, EHSD's Workforce Development Board began using Human Centered Design to implement changes that could extend to other EHSD Bureaus.

HSA's Innovation Office Experience

The HSA Innovation Office was established in 2014 following the completion of a project where the non-profit Code for America was engaged. Marc Hébert, one of the Code for America team members, joined HSA and went on to initiate the use of Service Design to improve performance as well as clients' and employees' experiences with service delivery. The HSA Innovation Office serves as an internal consultant to HSA with a charter to improve customer and staff experience with service delivery through innovation. For HSA, Innovation = empathy + experimentation + evaluation. A combination of methodologies and toolkits are in use at HSA including Visual Facilitation, Human Centered Design (Stanford d. school), Lean Process Improvement (Denver Peak Academy), social and behavioral science, results based accountability, and qualitative and quantitative metrics.

Success and Challenges

Initially, HSA used an educational approach to facilitate organizational change. However, this approach was not as successful as a later approach where knowledge was transferred by having the Innovation Office work directly with the staff on their improvement projects.

As part of this approach, staff were given permission to make changes and try out ideas to improve customer and employee experiences. However, staff assigned to the process improvement projects found it challenging to manage the time and mental commitment to the work and stay engaged when faced with urgent agency work.

Even with the noted challenges, the impact of the Innovation Office is evident with the successes that the HSA has attained in areas such as Human Resource (HR) management and lobby management. The Innovation Office used the Service Design model along with the toolkits and methodologies mentioned earlier to help HR make numerous improvements. It improved the internal and external communications to better respond to customer's most common questions. Hiring processes were changed to make it easier for managers to hire. A kudos wall was set up and a staff appreciation practice was established. Communication was improved through clarified roles and responsibilities and task assignments. The organization and content of meetings were improved and informative newsletters were issued. Processes were standardized. These improvement activities resulted in a rise in staff morale, reduction in payroll error rate, and improved wellness and motivation among staff.

To improve lobby management, HSA implemented an Express Lane for transactions that require Eligibility Worker action. Some of these transactions include EBT card requests, dropping off applications, and changes in address. This decreased the wait time for customers dramatically. Other offices have implemented the same processes in their lobbies.

Now the Innovation Office faces another challenge. Due to its success in facilitating change, the Innovation Office has received more requests to provide process assistance and improve clients' experiences than the office can handle. The Innovation Office currently is staffed with one full-time employee. Additional resources are expected to be recruited soon through another service designer and a visual designer.

Overview of Methodologies Used

Lean Management supports continuous improvement and implements small, incremental changes to improve efficiency and quality. It looks at business processes iteratively from the end customer's perspective and eliminates steps that do not provide value until all waste is eliminated. This leads to cost savings and efficient service delivery.

Denver Peak Academy, in its implementation of Lean Management, believes that staff who are the experts in their own areas can be positive agents of change to innovate their own jobs. Lean Management relies on staff to own the processes, take responsibility, and continually improve the processes. Staff feels empowered, heard, energized, and valued. It is important that staff recognize and accept that there may be areas beyond their power of influence or control, which may be due to constraints or boundaries that require the agreement of impacted stakeholders.

Human Centered Design is a design and management framework that develops solutions to problems by involving the perspective of the people who experience challenges to fill a need in all steps of the problem-solving process. HSA used this approach to fully understand people's experiences through empathy, observation, and interaction. The agency used Specific, Measurable, Achievable, Relevant and Time Bound (SMART) plans in defining and implementing objectives. Existing processes and decision points were mapped, obstacles and values were identified. Unnecessary steps that are not legally required or do not provide value to the customers were eliminated. The solutions were prototyped and incrementally implemented. Some of these solutions are low cost or no cost solutions.

Each success is measured by how many people were helped (effectiveness) and how much anyone is better off (efficiency) by measuring Time, Errors, Amount and Money (TEAM) as

well as overall satisfaction. It measures how long the process takes, how many mistakes are committed, how many customers are served and how much is the cost of labor and other expenses incurred.

HSA also used the following techniques to facilitate the design of process improvements:

- Eliminating Obstacles – Clear and simple forms, instructions, checklists and '5S' are some of the tools that can be used for eliminating obstacles. The term '5S' stands for Sort, Set in order, Shine, Standardize, Sustain. It is a simple, structured, repeatable method for keeping workspaces clean, organized, and safe to keep morale up and reduce cost.

- Shrink the Change – This tool involves defining the problem and repeatedly asking the question "why" to drive to the root cause of an action or problem.

- Objective vs Strategy – This tool aims to clearly differentiate and identify the objective versus the strategy to achieve it.

- WRAP- This methodology stands for Widen options, Reality, test Assumptions and assume distance, Prepare to be wrong. It explores possibilities by using 'YES AND' instead of 'EITHER/OR'. It involves assumption testing by asking is anything missing. It projects into the future, corrects and improves the solution.

Recommendation

EHSD should consider Service Design as approach to strategically deliver great service and better support its staff. Service Design can be used to improve processes and promote a culture of innovative, solution-based thinking resulting in an agile, efficient, effective, and motivated work force delivering high quality services to satisfied customers.

Improvements in service delivery and customer interaction will help with customer compliance. This will also result in staff appreciation and fulfillment at work. Transactions would be streamlined and completed without interruption, delay, or mistakes improving performance by reducing the amount of work to complete a given task. As improvements are successfully implemented, resources freed through productivity increase would be available to be allocated where needed.

The successful implementation of Service Design at EHSD will require commitment of the Executive Team to support new ideas and changes to improve customer and employee experience. Management sponsorship will help build trust and provide a safe environment for promoting change. The implementation will also require an initial investment in a dedicated, impartial resource to guide process design and the implementation of changes. The individual must be objective, innovative, and open to new ideas with strong facilitation and analytical skills. Equally necessary is the individual's experience with service delivery, process improvement, and change management. While not all improvements would require change in technology, expertise in technology is also desired to support the strategic initiative of leveraging technology and customer facing automated solutions.

Based on HSA's experience, it is advisable to pilot Service Design in an area where change is desired and a new approach would find acceptance and commitment. The objective of the improvement effort is not about blaming people but instead about fixing the system where improvement is needed. To provide a more holistic view of business processes and the systems that support the processes, Program Analysts and Systems Analysts should be included as Subject Matter Experts (SMEs) in addition to each position that touches the process in need of change, including clients' perspectives.

Training on the Service Design concepts, its toolkits, and methodologies, as well as Human-Centered Design at the Stanford School, is essential. For example, it is recommended that key staff attend Lean Management and Denver Peak Academy training. These Service Design "champions" will gain techniques and skills that can be applied towards designing for performance and in doing so, spread their knowledge through the organization.

Quick successes over a short period of time are less risky and encourage engagement, momentum, and continuity. This approach also provides a positive perception of the changes. The use of Lean Management's phased or incremental approach should be considered as organizations sometimes absorb change more rapidly in small portions than when the undertaking is a big organizational change project.

Over time, staff can initiate the improvements and need not rely on the top-down driven changes. This change in mindset will ensure sustainability and continuity.

It is likely that EHSD would see immediate results through a Service Design initiative using incremental and continuous process improvement. EHSD staff's commitment, inherent desire to help customers, and desire to do an excellent job bodes well for the success of this endeavor.

Acknowledgement

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