

COUNTY SERVICE CENTER GROUP

CSCG MISSION STATEMENT:

The County Service Center Group is committed to maintaining a membership organization which promotes continuous learning and the exchange of information and ideas between California County Needs-Based Service Centers. We partner in an ongoing effort to improve work processes and deliver quality service in a professional, timely and efficient manner.

Managing and Measuring to Service Center Standards

We are in the home stretch of 'October 1' preparation. Policy agreements are in place, the ACD is in order, call routing is determined, call guides and process flows are drafted, staff is hired and training has begun.

What's next? We have planned for the **expected**; now prepare to manage the **unexpected**.

Managing in a dynamic and unpredictable environment is a challenge. This newsletter will focus on how to manage both the expected and the unexpected. Understanding and manipulating the variables that result in a service level is a learned skill. Reacting to change quickly is a requirement.

What do you do when:

- Calls far exceed projections and you are unable to answer all of the calls...for only 1 hour per day? The other 11 hours you are overstaffed or right staffed.
- Taking an application over the phone requires 3 callbacks.
- You have built it but they have not come? Your EW's in the Quick Sort Transfer queue are knitting and playing Sudoku while your 'program' EWs are busy with the 30+% increase in new clients.
- The calls are taking longer than projected for some of your staff.

The enclosed articles discuss these variables and address an operations management structure that enables the organization to manage in a new operating environment.

Vail Dutto~CEO, InTelegy

Metrics Management - Controlling the variables that impact Call Center service level goals

A call handling operation is a dynamic entity - the quantity of work, resources available, productivity of those resources and the peaks and valleys of client need all impact service level. *The Call Handling Service level equation* is a simple way of understanding a complex problem. The equation breaks down the complex call center environment into 3 main variables:

Service level attainment is a function of the amount of work (call volumes) against (or divided by) the resources (staff on phone) multiplied by the performance of those resources. TM-InTelegy Corp

The Call Handling Standards Equation

$$\text{Client Service Level(s)} = \frac{\text{Quantity of Work}}{(\text{Available Resources}) \times (\text{Call Handling Performance})}$$

Variable 1= Quantity of work (call volume & call volume patterns)

Variable 2= Available resource to perform work; multiplied by

Variable 3= Call handling performance of EW call agent productivity, self-service option & queue tolerance

Call Volume and Call Volume Patterns – For an HHS Department there is a fairly predictable monthly and weekly call volume pattern: approximately 35% of the month's calls come in the first week of the month and Mondays and Tuesdays after a holiday are generally 50% of the total weeks volume. Total volumes depend

on the number of cases and/or intakes anticipated that month (benchmarks can be obtained via '?Ask the Consultant' at www.intelegy.com).

Available staff resources to perform work- Having sufficient resources and having sufficient resources on the phone at the right times are very different things. Consult your Workforce Management (WFM) system for the 'right' number of staff to handle the call volumes at any given time and check frequently to ensure that *scheduled staff, at work staff and logged in staff* are within 5%.

Call Handling performance – Call agent performance is measured by the Average Handle Time (AHT) = Talk time + After Call Work (ACW). The AHT will determine how many calls per hour an EW can support. Although AHT may vary based on call content, a consistent AHT should develop over the course of a month so that the call center can identify how many FTE's are needed to manage the predicted call volume. Reviewing the individual AHT against predicted average AHT will give direction to the capacity of your staff.

Measuring and managing these variables, while also assessing other ACD states like "not ready", will give you the ability to dissect and determine what 'to do' if your call center is not meeting service levels. Adding more staff is not always possible and not always the right answer. A keen understanding of these variables, and how they interact, will provide you with the data you need to take the right next step.

Coming together is a beginning; keeping together is progress; working together is success.
 -Henry Ford

How do we work together in this new environment? With the implementation of these new processes, whether a full scale service center redesign or simply the addition of the Quick Sort Transfer call handling process, there is no single management activity that is more important than measuring and managing volumes, service measurements and individual contribution.

It is not uncommon for county operations to have been managed using a limited amount of historical data about case activity or performance measurements driven by the state. *Monitoring a queue* used to mean walking out to see how many people were sitting in the lobby. *Service Level* may have meant how many days until benefits were granted. In the Needs-Based Service Delivery model we now have a number of new technologies that provide real-time data literally as it is happening, and historical data that is available daily and measures service level indicators at all channels of access.

The chasm between the way operations were managed in the past and the metrics driven management style that is now possible, and the difficulty that the management team will have in successfully leaping that chasm, should not be underestimated.

The operations management approach described in this document is an *InTelegy Best Practice* that supports the dual goals of educating supervisors and managers on the key metrics used to manage their operations, and ensuring that organizational productivity objectives are communicated and supported from the executive to the individual worker level. At launch you should have a series of planned meetings scheduled that ensure the newly available metrics are reviewed and management decisions are made to ensure success in your new processes.

Ongoing Operations Leadership Team Meeting

Meeting Time & Frequency: Weekly

Attendees: Director, Program Managers, Data/Reporting

Meeting Objectives: Review key metrics (Lobby, Phone, Task) by each office relative to objectives, identify opportunity areas, determine flexible use of staff to meet priority client service objectives and define corrective actions

Ongoing Operations Supervisor Team Meeting

Meeting Time & Frequency: Weekly Conference Call

Attendees: Program Managers & Supervisors from all offices

Meeting Objectives: Review key metrics (Lobby, Phone, Task) by office, by unit and overall relative to objectives, review staff availability by unit and office, identify opportunity areas and define corrective actions

1:1 Meetings: Program Manger: Supervisor

Meeting Time & Frequency: 1x Month

Meeting Objectives: Review key metrics by unit, comparing to averages, identify staff improvement plans

1:1 Meetings: Supervisor: Staff

Meeting Time & Frequency: Weekly (daily to address emerging issues)

Meeting Objectives: Review key metrics (for the specific worker, comparing to averages and personal objectives, identify opportunity areas and define corrective actions

Meeting Objectives: Review key metrics (Lobby, Phone, Task) for the specific worker, comparing to averages and personal objectives, identify opportunity areas and define corrective actions

InTelegy News

InTelegy would like to introduce two new consultants: Ian Day and Stephen Sproul:

Ian Day brings 20+ years of software engineering experience, team leadership and management along with 10+ years of project/ program and product management experience. Ian is heading the IT SWAT team.

Stephen Sproul brings 30 years of achievement in the IT field with areas of expertise to include network development, enterprise solutions, voice and data telecommunications, along with strategic planning and engineering.

October 2-4 CWDA Conference — InTelegy is proud to be a sponsor for the upcoming CWDA conference. Mark your calendars for the annual CSCG reception and dinner on Thursday, Oct 3rd. Watch your email for invitations arriving in September. Contact MargaretCondie for additional information.

?Ask the Consultant - InTelegy invites you to try a new feature on our website (www.intelegy.com) . Do you have a Service Center question? What are other counties doing? How do I implement Workforce Management? What kind of productivity should I expect? **?Ask the Consultant** and expect an answer in 24 business hours. We invite you to try it out!!

Service Center Updates

Besides the preparation for Healthcare Reform that every county is busy with today, **Santa Cruz** and **San Francisco** Counties are also redesigning their service delivery models at the same time. Both of these counties expect to go live with their redesigned processes to support the 2014 Healthcare Reform initiatives and have included phone, lobby and task redesigns.