

Customer Service is Changing

Service Delivery in government agencies is changing – channels of access are opening, the customer experience is becoming increasingly responsive to customer needs and increased technology is driving efficient customer service processes. Many agencies are redesigning lobbies, enhancing call center services, and reorganizing case management processes from 1:1 to 1:many in terms of the customer to staff ratio. With the improvement in these customer experiences, counties are implementing new technologies that include call management, lobby management, self-service kiosks, electronic signature, automatic text/email, and workload distribution and management tools. These new processes and tools make it easier for customers to access the necessary services quickly and provide agency management with more accurate visibility to the outcome measurements of the customer experience.

These changes in the customer experience have had a significant positive impact, but the foundation on which these revised processes are managed has been slow to change. With the increase in customer access channels comes the need to eliminate traditional management structures and move to a more functional—or customer service-oriented—organizational structure. Traditionally, government agencies have had a program or geographically-based management structure. Middle management has the responsibility for a specific building or geographic area or program. Within that responsibility, they manage all processes and people and act as independent business owners. In these traditional structures, managers and supervisors are managers of people and policy. They are responsible for program and building, but not customer-impacting functions. In this structure, managers spend most of their day on customer or personnel escalations and make independent decisions on processes that are specific to their building or units of responsibility without consideration for the impact on the overall customer experience. The focus is appropriately internal: “How are **my** people doing? Did we get **our** work done? Do I have enough resources in **my** unit to meet **my** standards?”

We are now seeing a shift in this focus. Today, the management team is asked to focus on both staff efficiency and customer service. Technology is allowing customers to be visible and the objective is to make it easy for those customers to obtain services. For example: “What are the call handling service levels? How long do my customers have to wait before they are

serviced? Can we eliminate their need to come into the office? What do we need to do to implement same day benefits issuance?” These are becoming increasingly relevant and demanding questions to answer.

Traditional Management Structures Need to Change

The implementation of technology, as well as the improvement in processes, has assumed that the walls are removed from customer services where the customer need is met by the next available resource regardless of geography. Furthermore, the “no wrong door” mentality is installed at all access points to service. **It is no longer “my case;” it is now “our customer.”** Today, the customers cannot always be seen as they have greater access to the county through call centers, self-service, and online applications. With the use of technology, we now have data to measure all aspects of the customer experience. However, responsibilities of the management team have not been modified to match this new service delivery methodology. The success of the new service delivery model is based on the management concepts of consistency, shared resources and data-driven decision-making. The organizational and management structures need to be modified to ensure these concepts are met.

Consistency: The customer has more choices today on how they can apply for benefits, get answers to questions about their cases, or submit required reporting to maintain services. These choices, and the resulting services provided, should be consistently applied across all offices, all programs, and all points of access. Without consistency, the customer may “shop” access channels for the desired outcome, thus creating confusion and an increased workload.

It is no longer “My Case;” it is now “Our Customer.”

Shared Resources: Customer services and operations are no longer constrained by staffing in specific buildings or geographical areas. Much more of the customer’s needs can be met by services that are **not** dependent on the customer arriving at one of the county buildings. Customer calls can be answered by any worker, online or mail-in applications can be completed by the next available worker, and interviews can be conducted over the phone without the need to see a specific worker in a specific office. With the removal of the barriers to service,

managers are finding themselves with the difficult task of managing their responsibilities, as those responsibilities have not been redefined. Staff resources are currently being stretched to respond to a dynamic customer need. Being responsive to real-time customer access requires the ability to flexibly use resources. When one channel is busy, the other may have capacity.

Data-Driven Decision-Making: Data is now available for all aspects of the customer experience. How many customers call for services? What were the reasons for those calls? How long did the customer wait to be served in a lobby? How much time did it take to process an application, interview a customer, or provide services in person? The data is plentiful, but the process by which the management team uses the data now needs to evolve. Decisions need to be made based on analysis of the available information.

Functional Management Structures

Implementing new management concepts requires a new management structure. In the new customer service delivery model, a “function” is defined as a delivery of services with similar processes and outcome measures. Example of functions include Call Handling, Case/Task Processing and In-Person Customer Service. By grouping these similar services to focus staff and management, the organization can eliminate duplication of work and infrastructure while maintaining consistency, regardless of how many offices or geographic areas are involved in providing service. Efficiencies are gained by utilizing capacity in one service area while another service area may be at or above service capacity. Technology allows the transferring of work to the next available worker or throughout the organization. Responsibility for these functions means:

1. The management of outcome measures
2. The efficiency of processes
3. The use of technology to ensure process consistency
4. The use of shared resources to achieve the organization’s objectives for service

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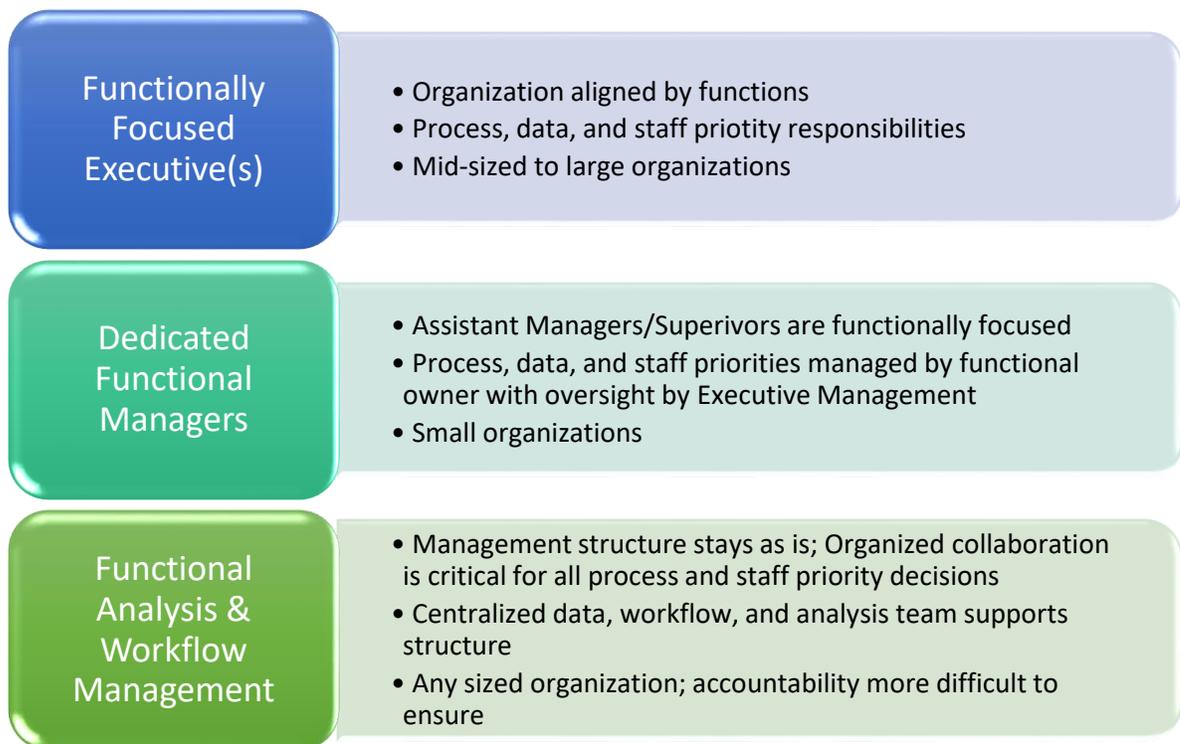
White Paper – Customer-Focused Organizational Realignment

Each county varies in its overall management structure, number and size of customer service offices, as well as the organization of responsibility between geography and program.

Therefore, each county will have different answers to these key organizational questions:

- What is the Chain of Command? Are the organizational reporting structures geographical, functional, or by program served?
- Who performs the data analysis and who has the authority to implement changes?
- How is process standardization accomplished?
- How is quality review accomplished?
- How is program policy handled? Is program policy a separate support organization or part of the operational functional areas?
- Is case-processing or tasks a part of the in-person and call handling teams or are they a separate functional team?

Understanding that it is not a “one size fits all” solution, InTelegy offers the following three examples of achieving Functional Management:



Functionally Focused Executive

In this model, the functional areas of focus are organized under one high-level manager, or team of management, to ensure a clean **chain of command** for accountability, flexibility, and customer focused decision-making. Staff are focused in the areas of: in-person/lobby services, call handling, and case/task processing. For example, case/task processing in Benefits Services could be further focused with a set of teams for ongoing case management, another for the intake functions, and another for generic task processing. Under one management structure, decisions on **staff schedules and priorities** can be made for flexible use of staff in order to accomplish priority services, as well as the evaluation and improvement of processes. The **data and analysis** related to each functional area is the responsibility of the managers within this area. They become the experts on the measurements of success in their specific areas.

“We service many different Human Services Agency clients in our main office. Historically, the staff in the lobby were managed by three different divisions based on the programs served. In 2016, we made a change in the organization so that all staff that served our customers in our lobbies were organized under one Deputy and Program Manager. This has allowed for a streamlining of the in-person services and shared resources across multiple programs for more efficient operations. Once organized this way, we were able to easily streamline the customer experience, update the aesthetics, and improve existing technology for a dramatically improved lobby!”

*- Sanja Bujay, Director of Human Services Agency,
Kings County*

Dedicated Functional Managers

A county of any size can identify assistant managers or supervisors, or teams of managers and supervisors, to be functionally focused. A supervisor is responsible for the specific management of a functional area, such as the In-Person Customer Service, to leverage this focus into an improvement in overall service. The **chain of command** for accountability in this functional area would start at the Supervisor level but would still roll up through a single management structure. Within this structure, which is useful in small counties, a team of supervisors are given the overall responsibility for **staff schedules and priorities**. With this functional focus the supervisors would be responsible for the **data and analysis** to include the real-time management of the service using technology dashboards provided by the customer service technology tools, as well as historical reporting on this specific area. The functionally-focused supervisors would be responsible for the assessment, improvement and consistent application of **processes** in the functional area and would make decisions regarding these processes, staffing, and prioritization to ensure success.

“Having the functionally focused Supervisors in our lobbies has improved customer service. The supervisors feel a real ownership for the processes and track the customer service measurements, ensuring that the best customer service is provided.”

- Leo O’Farrell, Program Director, San Francisco HHSA

Functional Analysis & Workflow Management-

If refocusing managers or supervisors to be functionally accountable does not fit into the organization's ability for change, this third option can be deployed to attempt the same outcomes of success and focus on the functional areas. In this example, the organization invests in a centralized team that oversees the

distribution of work and the day-to-day **data and analysis** of activity levels, service levels and, ultimately, outcome measures. With this model, management from across all areas is expected to work collaboratively with the support of the centralized team to review data and processes specific to a single function. The decisions about this function, for instance, in-person lobby service, are made at the committee level and applied to all offices providing this service. **Chain of Command**

would remain as is, with the managers and supervisor reporting structure in their tradition model. But, decisions about staff **scheduling and priorities** would be made in collaboration with the team of managers. Similarly, **process** improvements would need to be managed through collaborative groups.

“Our Service Center Reports committee has been extremely successful in giving all of our Deputies and Program Managers a forum with relevant data to discuss all of the service delivery channels in our Service Centers. We use this time to balance staffing needs to meet the customer’s needs as best we can and ensure we meet Federal and State processing timelines”
- Linda Espinosa, Deputy Director, Fresno County DSS

As new processes and tools make it easier for customers to access necessary services quickly and provide agency management with more accurate visibility into the outcome measurements of the customer experience, the need to rethink your management structure has never been more important. Service Delivery changes that ensure customers get the best service possible, through whichever channel they choose, have had a significant positive impact on these customers. Now, the foundation on which these revised processes are managed must evolve accordingly.