

THE CUSTOMER EXPERIENCE 2.0

**Delivering a World Class Customer Experience
Of Public Assistance Programs
in Santa Cruz County**

**CWDA Conference,
October 8, 2014**

Ellen Timberlake and Emily Balli

Presentation Goals

- ❖ **Overview of Our 6 Keys Customer Experience Model**
- ❖ **Reflections on Implementation**

Look and Feel



Inspire and Nurture the Human Spirit—
one person, one cup, one neighborhood at a time

On-Line, By Phone



Inspire and Nurture the Human Spirit—
one person, one cup, one neighborhood at a time

High Quality Service



All the Time



Think different.

1

**The Desired
World Class Customer Experience is**

Defined and Embraced

✓ Welcomed and Comfortable

✓ Heard and Supported

✓ Accepted and Respected

✓ Informed and Empowered

“Every call is perceived as a way to make a positive emotional connection with a customer” CEO - Zappos

And Consistently Delivered

ACROSS ALL TYPES OF CUSTOMER INTERACTION

Staff

- ✓ Implement “WE CARE” Steps of Service” Model WC”
- ✓ Revise Recruitment & Induction Training Model

Technology

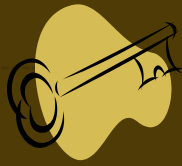
- ✓ Align Customer Service Choices in Phone ACD and Lobby Kiosk
- ✓ Strategically deploy Mass Media Technology
- ✓ Implement voice signature and implement all points of entry Imaging

Facilities

- ✓ Align Look and Feel of the Customer Walk In experience
- ✓ Review functional layout and business flow at both application centers
- ✓ Develop standardized interview room model

Informational Materials

- ✓ Brand and standardize media messaging, signage, written packets etc
- ✓ Refresh and Align Website Message



Steps of Service Model

Welcome and Personalize Greeting

Engage and Clarify Expectations

Communicate and Gather Information

Address Customer Needs

Review and Resolve Questions and Concerns

End on a Positive Note

Opening

Middle

Close

Apple's Secret Sauce

- A** pproach Customers with a Personalized Warm Welcome
- P** robe Politely to Understand All the Customer's Needs
- P** resent a Solution for the Customer to Take Home Today
- L** isten for and Resolve Any Issues or Concerns
- E** nd with a Fond Farewell







2

Staff have Standardized, Clear and Accessible Information

- **Program Policies and Business Processes are:**
 - ✓ Interpreted and disseminated in a standard and timely fashion
 - ✓ Integrated with technology requirements
- **A Workforce Schedule Model for all Benefit Representatives, Clerical Staff, Supervisors, and Managers is used to:**
 - ✓ Maximize the ability to enrich the customer experience and meet performance goals
 - ✓ Forecast work demands and deploy staffing resources
- **Consistent Communication with Staff is evident in:**
 - ✓ The commitment to Constant Feedback Loops
 - ✓ The structure of meeting agendas
 - ✓ The frequency and clarity of our program updates and business processes
 - ✓ The shared understanding of our operational reports and performance data

3

Functional Job Expectations for Staff Provide Flexibility

Old Model:

Eligibility: Workers II / III



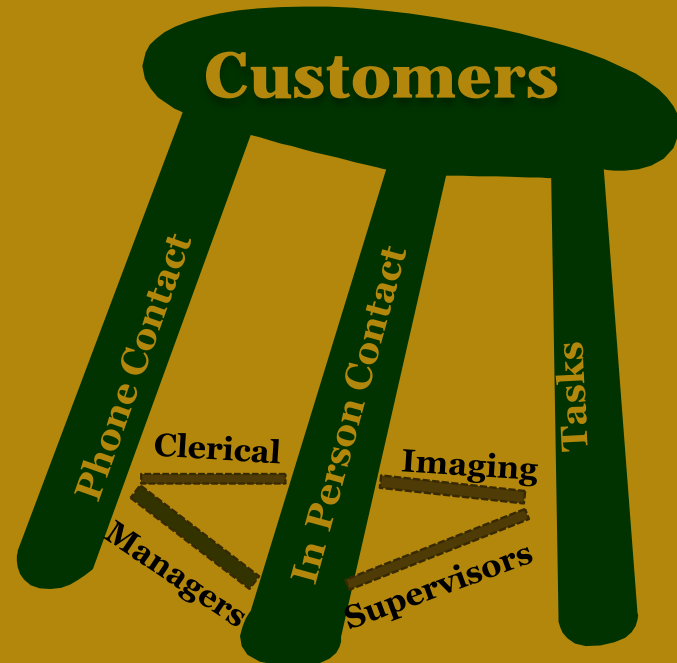
- ✓ Intake
- ✓ In Person
- ✓ Tasks



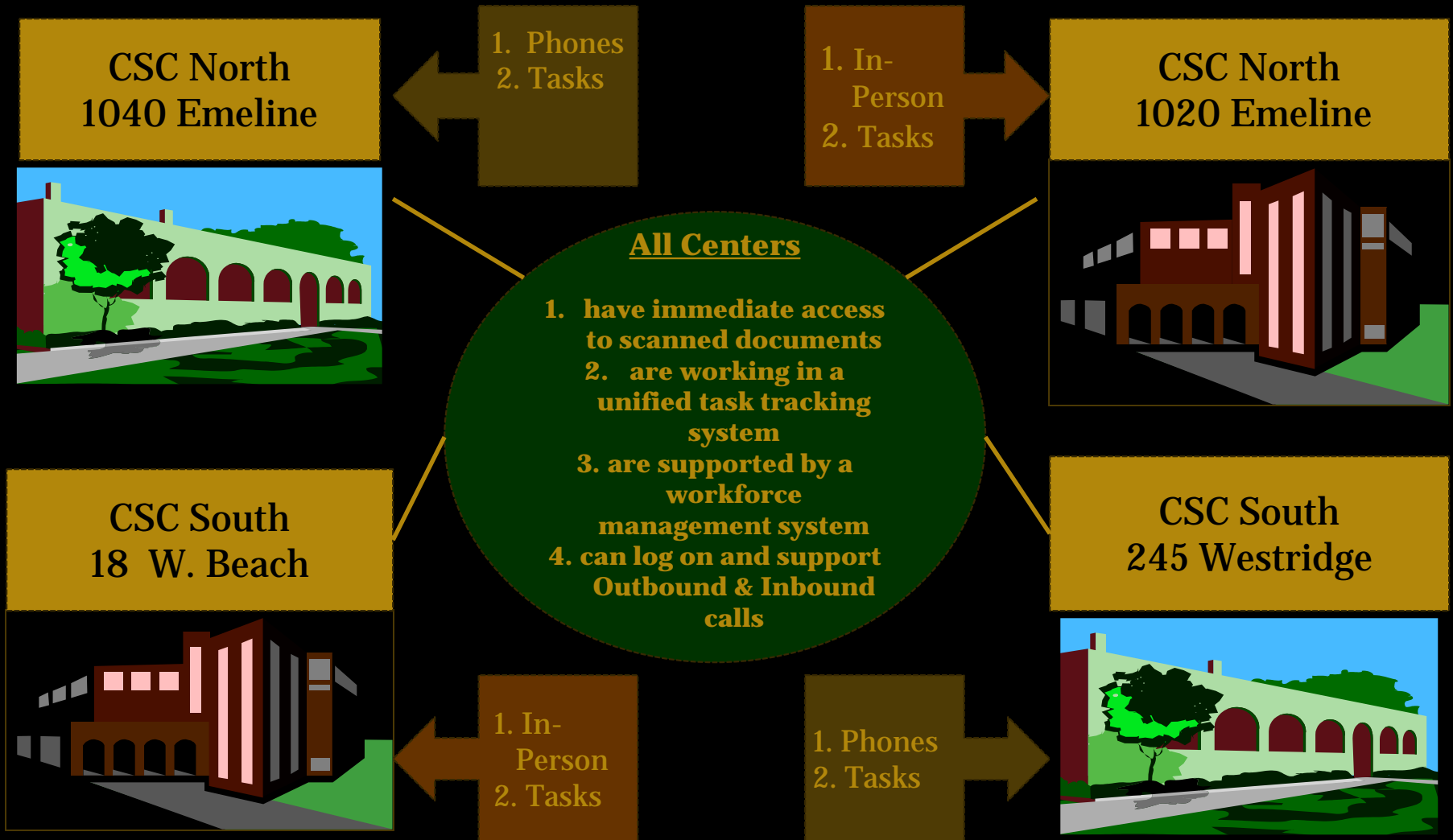
- ✓ Ongoing
- ✓ Phones
- ✓ Tasks

New Model:

Benefit Representatives



Across Four Customer Service Centers



4

Technology is Optimized and Integrated

The External Customer Experience



Technology is Optimized and Integrated

The Internal Customer Experience



5

Success is Defined and Monitored

What Matters the Most

The Customer Experience

- ✓ How they feel about us
- ✓ How they feel about themselves

The Difference in their Lives

- ✓ Did they get what they need when they needed it
- ✓ And keep it for as long as they're eligible

A Leading Edge Public Sector Model

- ✓ Is a great use of tax payer dollars
- ✓ Efficient
- ✓ In compliance with government regulations and performance standards

How We Measure It

Self Reflection

Dialogue

Customer Feedback –written/ verbal

Key Performance Indicators

Timely & Accessible Data Reports

Quality Assurance Model

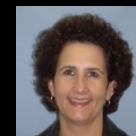
CWDA Adopted Definition

Excellent customer experience is achieved when customers feel informed, respected, engaged, and their needs have been addressed in a friendly, timely, and effective manner.

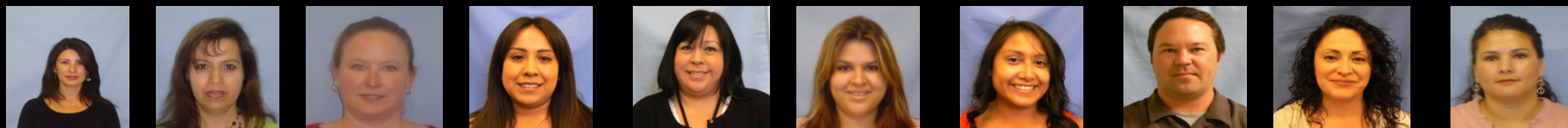
6



THE GOLDEN KEY



RING CHAMPIONS RINGS CHAMPIONS



Reaching for the Stars

Customer Experience 2.0

| | |
|------------|--|
| Character: | Exec Management Sponsorship and CX 2.0 Steering Committee |
| Character: | Employment and Benefit Services Division Staff |
| Character: | Customers Interviews and Focus Groups |
| Character: | Dedicated “Kick Off” Team: All staff levels represented |
| Character: | Professional Consultants: PR Firm, Customer Service Expert |
| Character: | Local Architects and Construction Firms |
| Character: | SEIU 521 |



Reflections on Implementation

Act One: Setting the Stage

- Acknowledge existing landscape
- Applaud customer service commitments

Act Two: Audience Participation

- Designate champions; involve all levels of staff
- Ask for input and feedback from internal and external customers

Act Three: Rock and Roll

- Turn over rocks—big and small
- Roll with solutions—trial and error

Act Four: An Unending Story

- Continuously adjust your lens to keep the customers' experience in focus
- Look for CX sequels
- Tell a compelling story

THE END

