

# Final Report Out: Mapping Customer Flows

---

AUGUST 28, 2019, 1:00 PM -3:00 PM

# Agenda:

---

- 1. Our Charter and Objectives**
- 2. What we have accomplished**
- 3. The Current State**
- 4. The Future State Vision**
- 5. Action Plan to achieve the Future State**
- 6. Next Steps**

# Why are we here?

---

Map the current customer flow both within and among the various Workforce Innovation and Opportunity Act (WIOA) partner workforce programs. Assess the most common customer flow scenarios to get an understanding of the current state and then identify potential gaps/opportunities, duplications including both in-person and internet based.

# Project Plan

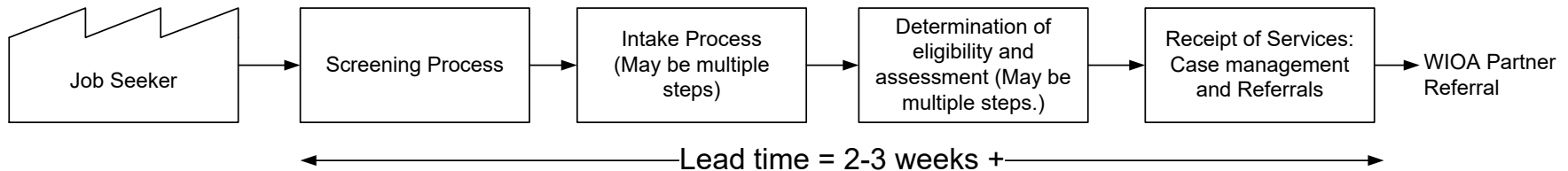
ACTIVITY	SCHEDULE	COMMENTS
Project Planning and Scoping	July/August 2018	Complete
WIOA Partner Project Kickoff and Planning Meeting	August 28, 2018	Complete
Mapping Current State Customer Flows of WIOA Partners	October 2018 – March 2019	Complete
Distribution of Current Maps to Partners	October 2018 – April 2019	Maps were submitted to teams as completed
Meet with Core Team to review Program Status	June 6, 2019	Complete
Meet with Working group and core team to finalize future vision and Plan	July 16, 2019 August 9, 2019	Complete
Meeting to review Current State, Future State Vision and plan	August 28, 2019	At Buena Vista with entire WIOA Partner Team
Final Plan and report Documentation	September 2019	

# Current State Maps/Updates or Improvements since Mapping

WIOA Partner	DATE
DET	1 October 2018
DVR	16 October 2018
DOE	18 October 2018
Libraries	18 October 2018
UI	14 November 2018
DSS TANF and Food Services	14 December 2018
SCSEP	28 January 2019
DVI – VR	25 February 2019
Division of Financial Empowerment	25 March 2019
Division of State Service Centers	25 March 2019
Delaware State Housing Authority	29 March 2019

# Basic Customer Flow

- Antiquated systems for interface and communication. Heavy dependence on USPS for client communication.
- No shows throughout the process
- Each WIOA partner has their own management and tracking systems
- Process can be frustrating and challenging for customers
- Employee frustration with the process.



- Redundant Information requested from every partner
- Intake/Screening Requires Documentation. Typically < 50% have Documentation.
- Assessments based on program requirements.
- Scheduling is time consuming and inefficient.
- Clients may be eligible but some waiting lists are long.
- Referrals are made based on Group or Tribal knowledge
- Individual Depth of program knowledge (internal and external) varies.
- For referrals, program information is provided to the client for the client to act on.
- Referral tracking and outcomes data is not available.

**Process is repeated for each referral!**

# Current State Observations

---

1. Lack Coordinated automation
2. Individual experience based on who they meet with first
3. Thinking is important to imbed in our agencies
4. People realized how complicated/inefficient their processes are
5. Are people falling through the cracks due to manual processes?
6. Can things be more self directed?
7. Waiting lists, How to keep them active.
8. DE VOCAL – Referral Portal, 10 questions, backend Connect.
9. Are we too focused on Quantity? Do we need more focus on Quality?
10. OTHERS????

# Improvements Implemented

State Service Centers implemented “Golden Ticket Program” to fast track clients with “4 problems” or more

WIOA Partners co-locating to service clients, (Libraries, One Stops, DOE...) Partner system access and ability to deliver services on site is a challenge

VOCAL Referral Service in Process

DOL improvements

- Improved RESEA scheduling
- Awareness to improve customer service
- UI linked Directly to DET

Alignment between DET/DOE GOALS Assessment – DET transitioning

DOE improvements:

- Improved distance learning accessibility
- Additional questions on referral process
- PolyTech hired part time Social Worker



# The End Goal....

---

**How can we provide the appropriate services to the client, exactly when they need them, while consuming the fewest resources?**

How can we provide a system in which the client provides information one time only?

How can we standardize the referral process to improve the quality of referrals so that everyone does referrals the same way?

How can we collect information about referrals to see how effective we are and incorporate learning into our process?

How can we more effectively and efficiently deliver appropriate services to the client?

How can we more effectively communicate and interface with the client?

# Future State Questions/Steps:

---

Step 1: What Does the **Customer** Really Need?

Step 2: How Can We Make the Work **Flow**?

Step 3: How Can We Improve Work, **Quality** and Reliability?

Step 4: What **Process Improvements** are Necessary?



## Step 1: What Does the Customer Really Need?

- Enter the System at any point
- Receive “one assessment of need”, with outcomes prioritized
- Receive services that are appropriate and timely to meet their needs
- Easy and equitable access to services
- Easy to communicate
- Only provide essential information once. (What is essential information.)
- Bring documentation that is necessary at the point of entry
- They do not want information overload!

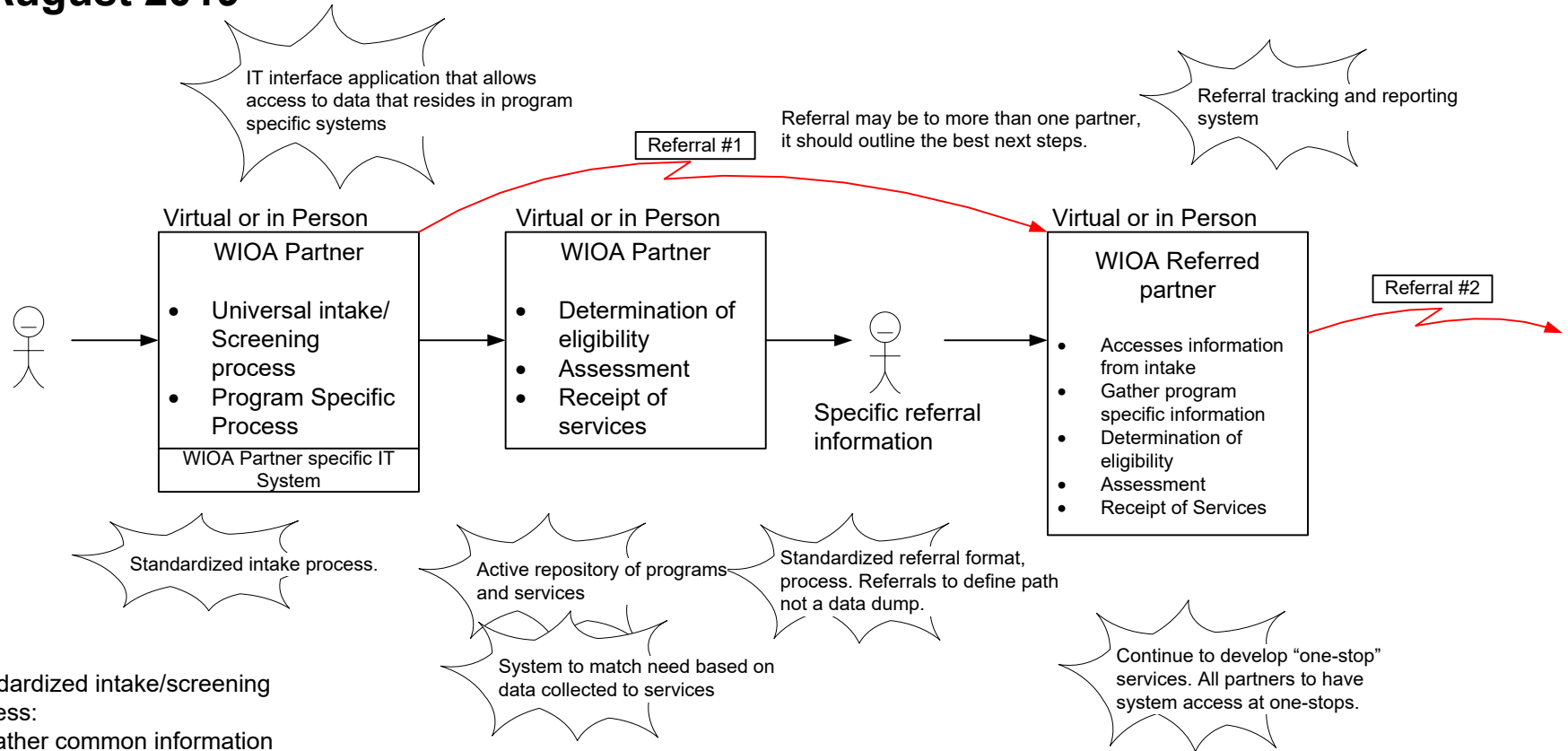
# How can we make the work flow and how can we improve work quality and reliability?

---

- Shared system for information and documents
  - MOU on information sharing
  - Idaho, Mississippi, Michigan – States that are currently doing this
- Standard Work/Consistent way to make referrals
  - Short Term – Resource List and Training
  - VOCAL
  - AI – Smart referral system (Minnesota – Bridge to Benefits)
  - Partner program sharing
- Gather Data on referral effectiveness
- Is there documentation that we can eliminate?
- How do we get people to bring documentation for services?
- Re-organize – One stop model – grow and improve
  - more resources
  - virtual?
  - What data/information do we need to understand where we need resources?
- Standardized intake/assessment referral process

# WIOA Partner Customer Flows Future State

9 August 2019



Standardized intake/screening process:

- 1) Gather common information
- 2) Gather common documentation
- 3) Standardized questions to assess need and referrals to relevant programs

Prior to IT system:

- 1) Programs and services list/spreadsheet
- 2) Training of frontline interface on services
- 3) Training on Standardized intake process
- 4) Development of listening skills and coaching skills.

#	Action	Lead	Team	By When	Comments
1	Repository List of Services (List to distribute to partners.)	Hope		Nov. 1 1 <sup>st</sup> Draft	
2	Front Line staff training on services repository	Hope		Nov/Dec - TTT program Mar 1. – FL staff	Hope to pull together Train the Trainer (TTT) program. and train partner staff. WIOA Partners to train front line staff.
3	Standardized “screening” process (utilizing current systems)	Hope		April 1	
4	Utilize “VOCAL” for referral and tracking Training/marketing to WIOA partners	Richard Wanda		Oct. 1 Oct-Dec	
5	Map of who’s where, when , what access they have (to better understand “one-stop” services) of One Stop Satellites/Extensions (Identify opportunities for Cross Training.)	Hope	WIOA Leadership	Jan 1	
6	AI to make smarter better referrals. Common intake and information gathering, including documentation. Sharing across parties	Bill Potter plus 3 members of the Leadership Team		Dec 1 – Project Team Assigned with Charter	
7	“Listening/Coaching” skill development to support WIOA partners, (cultural shift)	Stacey Bill Alta?		Mar 2020 – Development approach	

# Next Steps

---

What are we missing?

What concerns do you have with the Future State Vision?

What concerns do you have about achieving the future state?