Lessons & Practices to Share

Washington's Business Re-Engineering Project

Overview

Washington has identified a number of best practices and lessons learned throughout our Service Delivery Review (SDR) – Washington's business process redesign. The following are critical to the success we have achieved to date in the monumental restructuring of our customer contact points for receipt of public assistance programs and services.

Project Structure

- ✓ **Project Manager** – It is important to have a point person coordinating and providing oversight for project actions and to develop a charter and process for how the work will get done and decisions will be made.
- ✓ **Management Support** – Ensure that the management team at every level is on board and actively providing support. Make sure this is visible to staff.
- ✓ **Consultant Expertise** – Our consultant was an integral part of all aspects of our project. In addition to their expertise, our consultant provided process management training to all staff, change agent training, conducted office assessments, and led office roll-out planning.
- ✓ **Staff Involvement** – Include the staff who do the work in the actual design and implementation planning.
- ✓ **Focus teams on specific parts of the process** – Break down the "walk of the client" through your services and identify key pieces of the process for teams to break down and analyze in a focused manner.
- ✓ **Avoid seeking total buy-in** – You will never get all staff on board up front. You will never get all staff on board ever; move forward anyway. Rule of thumb – 20% of your staff can't wait to get started; 60% are on the fence; 20% won't come along and never will.

Process Management

- ✓ **Focus on the Process** – Make sure that you are analyzing your processes. Efficiencies can be found in how our workflow is structured without asking staff to "work harder".
- ✓ **Clearly identify widgets** – Ensure that as part of the process mapping, teams are identifying their products and the processes that they work in to produce these items.
- ✓ **Identify key measurements** – As processes and products are identified, include how they can be measured so you can track times and measure process performance.
- ✓ **Standardization** – Ensure that each core process is consistent. Clearly define what the process is and develop tools for staff to reference.
- ✓ **Specialization** – Give staff specific roles and functions to focus on the majority of the time.
- ✓ **Flexibility** – Monitor processes and flow resources to align with the customer demand.

Streamline Policy

- ✓ **Simplified Reporting** – Reduces required customer contacts and improves accuracy.
- ✓ **Expanded Categorical Eligibility** – Reduces required verification and interview questions (e.g. resources)
- ✓ **LIHEAP** – Leverage LIHEAP funds to provide maximum utility deduction to all clients and reduce verification and interview questions.
- ✓ **Streamlined Verification** – Eliminate any unnecessary verification requirements (e.g. deductions for food assistance). Most of these types of verifications do not improve accuracy, but do delay benefits.
- ✓ **Interview Scheduling Waivers** – Eliminate the need to schedule appointments. Scheduling appointments adds effort and builds in delays for work that will have to be done at some point anyway. Eliminate the requirement for customers to physically see us in person for their interview. Phone interviews are not found to add risk.

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Pre-Implementation Musts

- ✓ **Transition Planning –** Ensure that all offices/units/entities identify the gap between "now" and the new model. Clearly identify next steps and tactics to fully prepare for change.
- ✓ **Reduce backlogged work –** As part of that plan, identify batch work that is behind and develop a plan to get it caught up. You cannot start same day service with a backlog!
- ✓ **Catch up appointments –** Clear out as many scheduled appointments as possible to get to "same day" interviews. This is a painful but necessary process.
- ✓ **Training for staff –** Ensure that staff have the tools they need to learn the new processes and procedures they will be using in advance. Develop a single source (handbook, manual, web-tool, etc.) for the procedures and the training so staff get a consistent message.

Service Delivery Best Practices

- ✓ **Build accuracy into the upfront processes –** Find ways to build case accuracy into the process as it is "live" rather than finding problems on a back end audit. The process itself should help identify some issues via peer review as work products flow through the system to the different teams. Washington also developed a specific focused screening tool to double check food benefit cases that fit a certain profile based on data.
- ✓ **First Contact Services –** Meet the customer's needs the first time. Avoid hand-offs during a process. Avoid pending cases whenever possible. This will increase customer satisfaction, reduce back-end work and re-work, and reduce repeated customer contact for the same need.
- ✓ **Eliminate scheduling and rescheduling –** This is added workload with no other purpose than taking up precious staff time. Serve the customer at their convenience.
- ✓ **Timeliness –** Once schedules and backlogs have diminished, timeliness will increase.
- ✓ **Specialize functions –** Allow people to focus on a particular job within the process. *Note* – cross training is essential to allow for the flexibility needed when resources need to be fluid.
- ✓ **Strategic Implementation –** Use a structured, hands-on implementation approach. Washington cross trained two teams of our own CSD and Quality Assurance staff to train and assist each office in transitioning to the new model. This also ensured each office got a consistent message, as well as the hands-on help they needed to use the new processes and procedures.
- ✓ **Post Implementation Review –** as soon as roll-outs are complete, return to offices to review practices. Change, especially cultural change takes time, and old habits sometimes die hard.

Communication

- ✓ **Strong communication plan –** Build a plan that covers multiple points of communication and identifies outcomes and responsibilities. For example – talking points to share will all managers, websites with information, regular update emails and articles on the news page, in-person presentations with offices.
- ✓ **Communication at all levels –** Make sure that responsibility is shared, and covers all levels. Provide clear and consistent messages for office administrators and line supervisors to share with staff. Expect all members of the project teams to share and get input from their colleagues.
- ✓ **Continual and ongoing –** Don't let communications drop off – keep the messages flowing and provide information in multiple formats to ensure maximum penetration.
- ✓ **Two – way communication –** Avoid just a top down approach. Develop a system to get staff feedback and questions and be responsive to the input received. Not everyone has to agree with the changes and not all suggestions can be incorporated, but all staff should have a chance to be heard.
- ✓ **Transparent decisions and open communication –** Make all information available to all staff. Be clear about why a recommendation was approved or was not approved. Encourage staff to be open with their communication to the project and management as long as it is professional and constructive.