



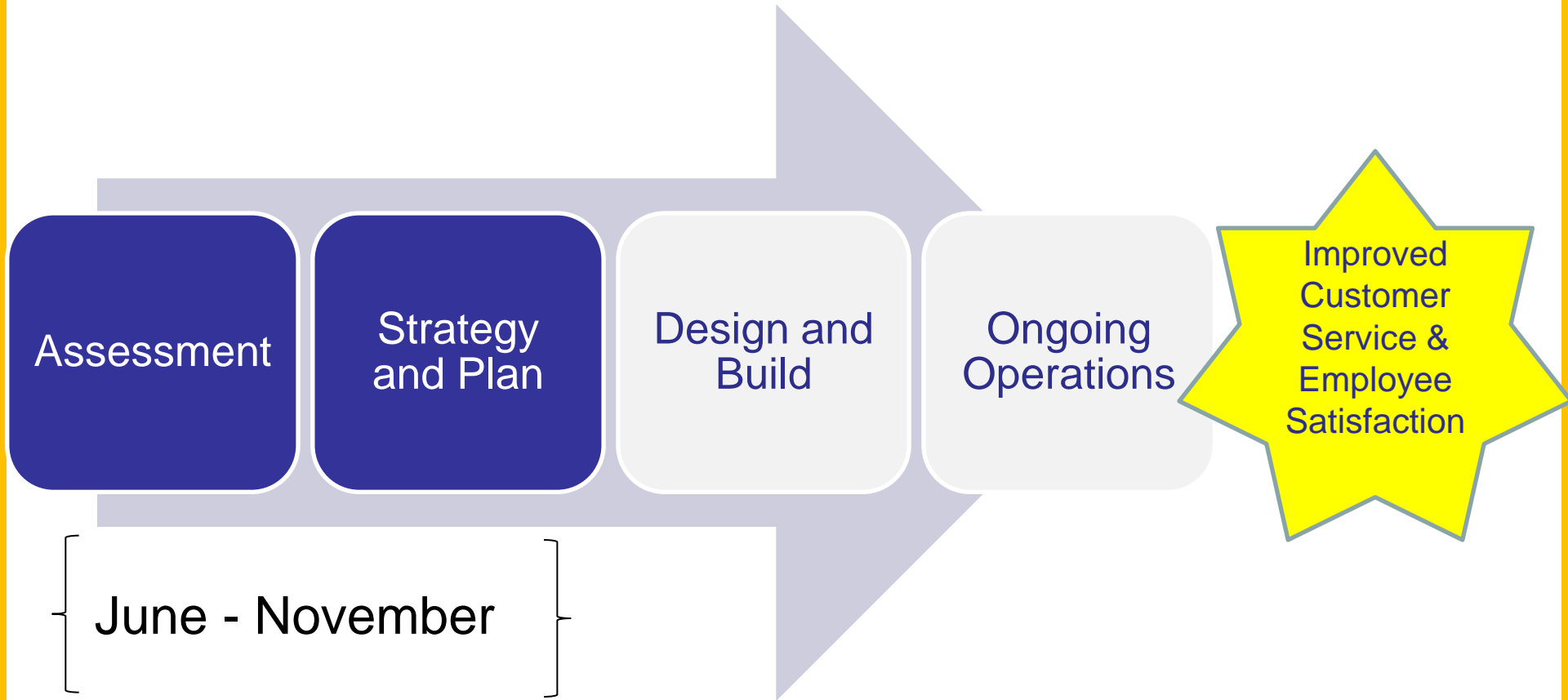
**San Diego Health and Human Services Agency
Client Services Improvement
Project**

June 29, 2011

InTelegy Overview

- Founded in 1996
- California County HHSA business and the unique requirements for People, Process and Technology, expertise includes:
 - Assisting with task management tool and process development
 - Customer service templates and best practices based upon experience
 - We assess the total client experience
- Our California County Clients include:
Contra Costa, Orange, Riverside, Sacramento, San Francisco, San Mateo, Santa Barbara, Santa Clara, Tulare, Santa Cruz, Solano, Sonoma, Ventura, Humboldt, Placer

Project Phases



Assessment Focus

- Current client experience reaching the ACCESS Center
 - wait times to reach an ACCESS EW
 - abandonment rates
 - busy signals
- Potential of alternative means of reaching the Center
 - Email
 - On-Line
 - Telephone
- Work process design between the ACCESS Center and the FRCs
- Lobby experience-intake and continuing clients
- Staff analysis
- Employee morale
- Client satisfaction
- Technology support opportunities
- Ability to create capacity for additional services

Strategy and Plan Focus

- Agreement on a clear statement of HHSA goals regarding quality client experience and employee satisfaction
- Recommended client experience
- Identification of impediments to reaching those goals
- Recommended solutions to overcoming impediments and achieving goals
 - Workflow and work allocation between the ACCESS Center and FRCs
 - Desired lobby experience
 - Staffing Level and resulting service levels
 - Organization structure
 - Benchmark measurements
 - Technology requirements
 - Facility requirements
 - Training requirements
 - Committee Structure for Phase 2 – Design and Implementation
 - Timeline and Budget for Phase 2

San Diego HHSA's Expected Role

- Overt and demonstrated executive support for the project-clear and frequent communication with staff
- Timely access to data and reports-an assigned point of contact to assist the InTelegy Consultant
- Ability to cross organization boundaries between the ACCESS Center and the FRCs to investigate dependencies and opportunities
- Timely access to staff to understand current work processes
- Timely access to technology resources to understand the infrastructure and opportunities
- Willingness to survey and establish baselines on customer and employee satisfaction
- Monthly status meetings with executives and key Managers

InTelegy's Role

- Preparation of monthly status presentations for Executives
- On-site data collection done in a professional and non-threatening manner
- Production and review of work products
- Frequent communication with key HHSA Managers- regularly scheduled status meetings
- Detailed and documented Assessment results
- Detailed and documented Strategy and Plan
- Open, honest and constructive dialogue

Assessment Methodology

- Interviews
 - Executives
 - ACCESS Center and FRC staff
 - Technology Partners
- Observation
 - ACCESS Center
 - Selected FRCs
- Data Collection and Analysis
- Documented Findings

Strategy and Plan Methodology

- Analyze assessment findings
- Document recommendations that include a wide range of potential areas – no ‘canned’ solutions to achieve
 - Satisfied Clients
 - Satisfied Employees
 - Improved Processes
 - Greater Efficiency
 - Higher Benefit Participation Rates
- Detail Recommendations
 - Operations: Organization Structure and Staffing; Workflow Process and Tools
 - Infrastructure: Task Management; Facilities
- Identify resources required
- Develop detailed milestones and timelines

Thank You!

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