



DWFS OPPORTUNITY PROCESSING OUTLINE: CCS

DWFS TEAM MEMBER James New Hire	JOB POSITION Case Manager	DAYS WITH THE COMPANY 180 days
STEP 1: JAMES' INTRODUCTION <ul style="list-style-type: none"> • WHO ARE YOU? • WHAT'S YOUR POSITION? • WHAT'S YOUR QUESTION? 	STEP 2: PARTICIPANT FEEDBACK <ul style="list-style-type: none"> • CLARIFYING QUESTIONS • JAMES' IDEAL OUTCOME* • BARRIERS & CHALLENGES • SOLUTIONS 	STEP 3: BEST-PRACTICE SPEAKER PAUL DUNN TALKS ABOUT THE BEST-PRACTICE BEHIND SELF-MONITORING

HOW DO I: (PRESENTED BY JAMES)

- **How do I practice Concierge Customer Service now that I'm working remotely and not seeing customers face-to-face?**

CLARIFYING QUESTIONS: (ASKED BY PARTICIPANTS)

- What is concierge customer service?
- What is a concierge?
- What part of CCS is the most challenging right now?
- Are these new clients or existing clients?
- What tools do you have to communicate with your customers right now?
- How do you evaluate your customer service?
- Is the contact/referral info for community agencies and partners easy to find?
- What did you handoff to partners not in your building? (pre-work from home)
- What ways are you contacting CBOs and agencies?
- Do you have a point of contact at your partner organizations?
- How long have you lived in the area? Are you familiar with the area?
- How do you assist customers who don't have access to the internet?
- What type of services are your customers looking for?
- Do you know who leads CCS at your local project?
- Have you thought of contacting the One Stop Operator?
- Have you utilized 211 to help refer customers?
- Do you use a script when talking to customers, agencies, and organizations?
- Have you spoken with your team and supervisors to see what assistance can be provided?

MY IDEAL OUTCOME IS: (PRESENTED BY JAMES)

- **I want to know my Community Based Organizations (CBOs) and Supportive Service options are so I can refer customers. I want to have a strong understanding of what CBOs and partners are in the area and how I can access that information from home.**

WHY IS IT SIGNIFICANT TO ANSWER JAMES' QUESTION? (ANSWERED BY PARTICIPANTS)

- Validate James' desire to serve customers and provide him with the tools needed
- Enhance the customer experience
- Our customer deserve the same service regardless of if we are at home or not
- Build stronger relationships with CBOs and agencies
- Help him provide the best customer service experience possible
- Customers need our help now more than ever
- His entire project can benefit from answering the question
- Establish trust with our customers
- He can have the most accurate information for the area he lives in

- He'll have a better idea of who does what, and who he can work with at each organization
- Customers needs referrals to reach goals
- Tremendous asset to his business and the community
- He will become more confident in his role
- Meet his monthly goal; meet performance
- He will be able to be a mentor for his team
- Build a pipeline for the future
- Maximize our services and our customer potential

BARRIERS & CHALLENGES – WHAT ARE JAMES' BARRIERS & CHALLENGES?

- Technology limits
- Maybe his CBOs are also working from home
- Not familiar with the area
- Time demands on gathering information and keeping it up to date
- Customers have a lack of technology
- Inaccurate information
- Not sure who to go to; no mentor
- Public resources are being closed
- Customer needs are out of the scope of what we can offer
- Home obligations; distractions
- Language barrier
- Lack of training
- New hire- no relationship with CBOs
- Lack of trust
- Maybe benefit access is changing due to the climate
- Not comfortable dealing with different kinds of needs
- Lack of understanding of what each CBO can offer

SOLUTIONS – WHAT ARE SOLUTIONS TO JAMES' POTENTIAL BARRIERS AND CHALLENGES?

- GET A MENTOR AND GET MORE FAMILIAR WITH THE AREA
- NETWORKING WITH CBOs THAT YOU DON'T KNOW AND FIGURE OUT WHAT THEY DO
- GET A DIRECTORY OF ALL CBOs IN THE AREA
- CONTACT CHAMBER OF COMMERCE AND LEARN FROM THEM
- JOIN COALITIONS
- HAVE PARTNER MEETINGS VIA ZOOM
- FOLLOW ORGANIZATION FACEBOOK PAGES
- JOIN TOWNHALL MEETINGS
- REACH OUT TO OUR LEAD AND SUPERVISOR FOR CONTACT INFORMATION
- SENDING AN EMAIL TO CASE MANAGEMENT TEAM TO ASK FOR HELP AND GUIDANCE
- ASK YOUR BOARD ABOUT CBOs
- CONTACTING OTHER CO-WORKERS; PICKING THEIR BRAIN ABOUT THE AREA
- VISIT CBO WEBSITES AND DO SOME RESEARCH
- BRAINSTORMING SESSION WITH YOUR TEAM
- BUILD A RESOURCE GUIDE FOR EVERYONE TO CONTRIBUTE AND ACCESS
- HAND OUT BUSINESS CARDS TO GET YOUR NAME OUT THERE
- IDENTIFY A SCRIPT THAT YOU CAN USE WITH CUSTOMERS, PARTNERS, AND CBOs
- UTILIZE 211 (IF APPLICABLE)
- IF POSSIBLE, STANDARDIZE AND SIMPLIFY THE REFERRAL PROCESS
- MAKING A FACEBOOK PAGE FOR YOUR PROJECT TO CONNECT WITH OTHER ORGANIZATIONS
- MAYBE YOUR ORGANIZATION CAN LOOK INTO DEVELOPING A PARTNER PORTAL
- MONTHLY OR QUARTERLY NEWSLETTER
- JOIN LINKEDIN
- UTILIZING LOCAL PRINT MEDIA
- ZOOM MEETINGS, VIRTUAL ROOMS, ETC.

BEST PRACTICE SPEAKER: (PAUL DUNN [CEO] ANSWERS JAMES' QUESTION)

- **WHAT TYPES OF SUPPORTIVE SERVICES ARE CUSTOMERS ASKING FOR? (UNIVERSAL AND PROGRAM CUSTOMERS)**
 - **FOOD**
 - **CHILD SERVICE**
 - **UTILITY BILLS**
 - **TOOLS FOR WORK**
 - **SHELTER**
 - **RENT ASSISTANCE**
 - **INTERNET**
 - **TRANSPORTATION & GAS**
 - **UNIFORMS AND CLOTHING**
 - **GED**
 - **DRIVER'S LICENSE RE-INSTALLMENT**
 - **LAPTOPS AND TECH TRAINING**
 - **THERAPY AND MENTAL HEALTH**
 - **BASIC COMPUTER SKILLS**
 - **1-9 DOCUMENTS**
 - **PHONES**
 - **IMMIGRATION**
 - **SOFT SKILLS TRAINING & ONLINE WORKSHOPS**
 - **BASIC LIFE SKILLS**
 - **BUILDING RESUMES**
 - **REGISTRATION FOR TWC AND OTHER STATE SYSTEMS**
 - **INTERVIEWING TIPS**
 - **EMPLOYER CONTACTS**
 - **EMERGENCY NEEDS**
 - **EX-OFFENDERS**
 - **MORE JOB LEADS**

- **IDENTIFY WHICH CBOs AND WHICH AGENCIES CAN PROVIDE THE SERVICES ABOVE?**
 - **RIGHT NOW, THERE MIGHT NOT BE A CBO THAT CAN MEET ALL THE NEEDS. ESPECIALLY GIVEN THE HIGH DEMAND**
 - **WE NEED TO 1ST FIND OUT IF A CBO OR AGENCY HAS FUNDS AVAILABLE***

- **DEVELOP RELATIONSHIPS WITH A PERSON AT EACH CBO THAT WE REFER TO (WARM HAND-OFFS)**
 - **IMPORTANT TO BE ABLE TO CHECK IN WITH THE PERSON ON A WEEKLY BASIS TO SEE IF THEY STILL HAVE RESOURCES**
 - **IMPORTANT SO THAT WHEN WE REFER, THEY GET REFERRED TO A SPECIFIC PERSON, AT A SPECIFIC LOCATION, AT A SPECIFIC TIME, WITH CONTACT INFORMATION (NAME, EMAIL, PHONE NUMBER, ETC.).**
 - **THIS IS A WARM HAND-OFF – CONFIRMATION AND CONSTANT COMMUNICATION WITH YOUR POINT OF CONTACT AT EACH LOCATION**
 - **IMPORTANT SO WE KNOW WHAT THE CUSTOMER NEEDS WHEN THEY SHOW UP (DOCUMENTS, ETC.)**
 - **IMPORTANT FOR FOLLOW-UP**

- **ONE DESIGNATED PERSON AT EACH PROJECT WHO IS REACHING OUT TO CBOs ON A WEEKLY BASIS**
 - **WILL HELP YOU KNOW...**
 - **WHO IS STILL OPEN?**
 - **WHO HAS RESOURCES?**
 - **WHO IS WORKING?**
 - **ARE THEY WORKING REMOTELY?**
 - **HOW CAN OUR CUSTOMERS ACCESS THE RESOURCES AVAILABLE?**
 - **THIS INFORMATION SHOULD BE:**

- **STORED IN SHAREPOINT**
 - **ON A PARTNER PORTAL**
 - **MUST BE AVAILABLE TO EVERYBODY**
 - **MUST INCLUDE ALL CONTACT INFORMATION FOR POINT OF CONTACTS AT EACH CBO**
- **THIS WILL HELP...**
 - **MAINTAIN RELATIONSHIPS WITH EACH AGENCY**
 - **STRENGTHEN TRUST BETWEEN DWFS AND CBOs**
- **BEST PRACTICE GOAL: PARTNER PORTAL WALK-THROUGH**
 - **ALLOWS US TO SEARCH A DATABASE FOR KEY SUPPORTIVE SERVICES IDENTIFIED ABOVE**
 - **MODEL YOUR CBO LIST OFF PARTNER PORTALS FOR BEST RESULTS**
- **UPDATE CCS TRAINING QUARTERLY AT EACH PROJECT**
 - **THIS NEEDS TO BE IN THE FOREFRONT OF EVERYONE'S MIND; KEEPING THE LIST CURRENT**
 - **LINK TO CCS VIDEO:**
 - ***PRACTICE CCS AND BRING IT TO LIFE EVERY SINGLE DAY***

QUESTIONS:

- **DOES EVERYONE HAVE ACCESS TO THE PARTNER PORTAL? HOW DO WE GET ACCESS?**
 - **TAMPA HAS ACCESS (THE ONLY PLACE WHERE WE HAVE THE PARTNER PORTAL AVAILABLE)**
 - **WE ARE UTILIZING THE PARTNER PORTAL WITH NEW RFPs AND PROJECTS**
 - **FOR EXISTING OPERATIONS WITHOUT THE PORTAL, USE AN UPDATED LIST ON SHAREPOINT**
- **HOW DO YOU FIND IT BEST TO MAINTAIN A RELATIONSHIP WITH CBOs IF YOU'RE USING THE PARTNER PORTAL TO MAKE REFERRALS?**
 - **THE ONE STOP OPERATOR CREATES RELATIONSHIPS WITH THE CBOs**
 - **OSO AND BOARD CAN HELP PUT RELATIONSHIPS IN PLACE**
 - **MAKE SURE WE ARE MAKING QUALITY REFERRALS AND FOLLOWING THEIR FORMAT (ECS)**
 - **EVEN WITH PARTNER PORTAL, WE NEED NAMES AND A POINT OF CONTACT FOR EACH AGENCY AND ORGANIZATION**
- **IS THERE AN EXISTING CCS TRAINING? WHO RUNS & OWNS IT?**
 - **YES, THERE IS A CCS TRAINING. TRAINING WAS PUT TOGETHER BY THE DLC ABOUT A YEAR AGO**
 - **CENTER MANAGER OR PROJECT DIRECTOR SHOULD OWN THIS LOCALLY**
 - **HELPS NEW STAFF LEARN ABOUT CCS**
 - **WATCH THE VIDEO AND UNDERSTAND THE CONCEPT**
 - **UNDERSTAND THE BENEFITS AND SUPPORTIVE SERVICES THAT OUR CUSTOMERS NEED**
 - **TRAINING HAPPENS LOCALLY**
- **ARE THERE ANY IDEAS ON HOW TO ADMINISTER SERVICES WITHOUT CUSTOMER CONTACT (OTHER THAN PHONE AND EMAIL?) WHAT TECHNOLOGY ARE WE UTILIZING TO DELIVER SERVICES?**
 - **GOOGLE PHONE ACCOUNT AKA GOOGLE VOICE (THIS IS FREE) SO WE DON'T USE PERSONAL CELL PHONES**
 - **SNAIL MAIL IS AN OPTION BUT TAKES TIME**
 - **TEXT NOW APP**
 - **ZOOM, SKYPE, AND FREE CONFERENCE CALL**
- **IS THERE A PERSON THAT CAN HELP US DEVELOP A ONE-STOP PORTAL?**
 - **DAN MCGREW – TALLAHASSEE PD**
 - **ASK YOUR PROJECT DIRECTOR***
- **IS THERE ANY SORT OF STANDARDIZED MESSAGE TO OUR CUSTOMERS?**
 - **YES- WE WILL CREATE ONE AND CIRCULATE IT WITH ALL PDs AND STAFF**
- **WHAT SHOULD WE DO IF WE IDENTIFY AN UNMET NEED? (PROGRAM CUSTOMERS ONLY)**

- **WIOA IS THE FUNDER OF LAST RESORT: THIS MEANS, IF WE SEARCH THE COMMUNITY, AND WE CANNOT FIND A COMMUNITY AGENCY TO PROVIDE THAT SUPPORTIVE SERVICE, THEN MOST WORKFORCE BOARDS HAVE SUPPORTIVE SERVICE POLICIES THAT CAN HELP US ASSIST THAT NEED**
- **IF THIS HAPPENS TO YOU, GET WITH YOUR SUPERVISOR AND QPT TO BETTER UNDERSTAND OUR POLICIES AND SEE IF WE CAN PROVIDE THAT NEED**

- **MONTHLY CONFERENCE CALLS ACROSS PROJECTS TO SHARE BEST PRACTICES?**

- **ANNUAL STATE OF THE COMPANY, MONDAY AT 2PM CT**

- **WHERE IS WORKFORCE DEVELOPMENT GOING? WILL ANY PROGRAMS BE ADDED?**

- **SPECIAL PROGRAMS WILL COME OUT TO RE-TRAIN WORKERS AND INDUSTRIES THAT WILL BE FOREVER CHANGED**
- **LOTS OF RETAIL WORKERS WILL BE LAID OFF; MIGHT NOT EVER COME BACK IN THEIR EXISTING ROLES**
- **WE WILL OFFER MORE VIRTUAL WORKSHOPS AND VIRTUAL COACHING**