



# DWFS OPPORTUNITY PROCESSING OUTLINE: ENROLLING IN ONLINE SERVICES

DWFS TEAM MEMBER <b>Josh Lead</b>	JOB POSITION <b>Case Manager</b>	DAYS WITH THE COMPANY <b>2 months</b>
<b>STEP 1: JOSH'S INTRODUCTION</b> <ul style="list-style-type: none"> <li>• WHO ARE YOU?</li> <li>• WHAT'S YOUR POSITION?</li> <li>• WHAT'S YOUR QUESTION?</li> </ul>	<b>STEP 2: PARTICIPANT FEEDBACK</b> <ul style="list-style-type: none"> <li>• CLARIFYING QUESTIONS</li> <li>• JOSH'S IDEAL OUTCOME*</li> <li>• BARRIERS &amp; CHALLENGES</li> <li>• SOLUTIONS</li> </ul>	<b>STEP 3: BEST-PRACTICE SPEAKER</b>  LAURA WYCHE TALKS ABOUT THE BEST-PRACTICES BEHIND ENROLLING IN ONLINE SERVICES

## HOW DO I: (PRESENTED BY JOSH)

- How do I effectively enroll customers in appropriate DWI courses?

## CLARIFYING QUESTIONS: (ASKED BY PARTICIPANTS)

- What kind of customers are you working with?
- How familiar are you with the DWI catalog?
- Are you enrolling one customer at a time? Groups?
- Are you familiar with any of the DWI courses that we offer?
- Does your project have specific products on DWI?
- What do you mean by 'appropriate courses'?
- What courses have you taken in DWI?
- What's the biggest need that you're identifying with your customers?
- Are you able to devote time each week to watching DWI courses?
- Is there anybody at your project who is a DWI expert?
- What are you experiencing when transitioning a customer to a virtual workshop?
- Is your project offering virtual webinars right now?
- Has your workforce board purchased DWI online workshop access?
- Is there a limit on how many courses a customer can take?
- How did you enroll in compliance courses via DWI?
- Do you know the free registration code for your project?
- Do you know who your DLC Coordinator is?
- Are you required to enroll customers or can customers enroll themselves?

## MY IDEAL OUTCOME IS: (PRESENTED BY JOSH)

- Have a simple, structured way to enroll customers in virtual DWI courses that will improve work readiness and professional development.

## WHY IS IT SIGNIFICANT TO ANSWER JOSH'S QUESTION? (ANSWERED BY PARTICIPANTS)

- Maximize on the tools we have available
- Facilitate a pleasant customer experience
- Keep our customers engaged and maximize our time
- Encourage our customers to embrace technology
- We want to embrace virtual services when it's appropriate
- Helps improve customer computer skills
- Provides help outside of the office
- It is our new normal to meet customer needs
- Expedites services
- Increases skills and soft skills

- **Complicated enrollment turns customers off to our product**
- **Most of the workforce works is online**
- **Most applications are online**
- **Gives the customer real life experience with types of training they will receive once hired**
- **Prepares them for lifelong learning**
- **Josh's confidence can carry over to the customer**
- **More responsive to customer needs**
- **Sense of direction**
- **Help Josh save time**
- **DWI knowledge is critical – it proves extra resources**
- **Improve Josh's ability to operate independently as a case manager**

#### **BARRIERS & CHALLENGES – WHAT ARE JOSH'S BARRIERS & CHALLENGES?**

- There are too many courses to sort through
- Lack of technology skills
- Not knowing what we offer
- Not knowing how to navigate the website
- Classes are not engaging
- Sometimes the codes only work for one course
- I did not know these were available to customers
- Customer is not computer savvy
- Staff knowledge of DWI is limited and makes the customer uncomfortable
- Not mobile friendly
- No English-speaking skills courses
- Customer's get frustrated once they know there is a quiz at the end
- Lack of DWI training on services
- Lack of DWI reminders
- Customer's fear new technology
- Lack of ability to track customer progress on DWI
- Customers living with disabilities
- Not authorized access
- Scared to do it wrong
- Thought it only for internal staff
- Too long of a process; approval needed my Center Managers
- Lack of communication
- Lack of feedback on people taking the courses
- Center is not set up for customers to comfortably take the workshops – only standing desks?

## SOLUTIONS – WHAT ARE SOLUTIONS TO JOSH’S POTENTIAL BARRIERS AND CHALLENGES?

- Ask for more DWI training
- Work with DWI and DWI Coordinators
- Develop an annotated bibliography of the courses
- Develop marketing material for DWI
- Take some time to familiarize yourself with the website and courses
- Take some of the courses
- Reach out to other case managers and projects to see what they do
- Ask for feedback from the participants
- Have customers take a survey
- Ask local facilitator to compare local workshops with DWI options
- Find DWI instructions on how to enroll
- Get familiar with the search bar function in DWI
- Ask to see what the most popular courses are
- Accessing DWI Support email address
- Become your office SME (subject matter expert)
- Have a ‘go to list’ of workshops that will benefit any customer
- Using a monthly calendar to be familiar about what virtual workshops are available
- Connect with DWI on social media
- Received information from supervisor → got instructions on how to register → had training

## BEST PRACTICE SPEAKER: (LAURA WYCHE ANSWER JOSH’S QUESTION)

- #1 – Understand the difference between STAFF CODE vs CUSTOMER ENROLLMENT
  - Knowing the difference between registration and enrollment
    - BRAND new customer? They need to be REGISTERED.
      - Going to DWI website
      - Enter name, email, etc.
      - Password and account creation
    - ENROLLMENT is when you are looking to take a new course/webinar
  - Utilizing the STAFF CODE – courses for YOU (internal employees)
    - Every project has their own code; project specific!
    - Updated every year (new contract year)
    - KNOW this code! You need it to access ALL courses for **free!**
    - Check courses out on your own with this code
    - Customers do not use staff code
- #2 – Picking the ‘right’ course for the customer (There is a COST for customers\*)
  - Subscription courses
    - If your project has purchased this, there is unlimited use for your customers (already paid)
    - This includes: **The 5-Minute Series (over 150+ courses), Industry Scholars, & Virtual Workz**
  - Each course has a short description
  - Utilizing the Wish List <3 (save courses to check out another time)
  - Take the course yourself to see what is available; work on your own professional portfolio to get familiar
  - Courses that are great for all customers (these COST MONEY!\*)
    - Extreme Customer Service
    - Extreme Customer Service Transformation
    - Dynamic Possibilities courses: (population specific!)
      - DP: Re-entry
      - DP: Abilities (disabled customers)
      - DP: Veterans
  - **FOLLOW YOUR AREAS POLICY** ON HOW YOU TIE IN COURSES TO CUSTOMER DEVELOPMENT

- #3 – Importance of data fields
  - When a customer is REGISTERING, they must:
    - Use a correct email address; customers need to remember email to log-in
    - Figure out a way to have the customer remember the password
    - Accurate, correct information for ALL fields
      - Zip code
      - Location
      - Etc.
    - This information helps DWI support you with reports and follow-up
  
- #4 – Understand INDIVIDUAL ORDER vs BULK ORDER
  - Individual order = course for ONE person
  - Bulk order = when multiple people are taking a course at once (Dynamic Futures, or any course that is in bulk)
    - This requires a number of ‘seats’
    - Seats – the person that takes the course
    - If you buy 20 seats for Dynamic Futures, you’re purchasing 20 of the same course for different people)
    - Whoever purchases all the courses must OWN and ASSIGN all seats
  
- #5 – What do you do when something goes wrong?
  - DWI Website – DWI Support
  - DWI Support Help Ticket; respond within 24 hours
  - Reset password button on DWI for yourself and customers
    - System generated email
    - Check junk/spam email for all DWI related emails

## **QUESTIONS:**

### **DO CUSTOMERS EVER PAY FOR COURSES?**

- No.
- YOUR PROJECT PAYS FOR THIS
- CHECK WHAT YOUR PROJECT ALLOWS AND WHAT IS AVAILABLE

### **IS THERE SOMEBODY AT EVERY PROJECT THAT YOU CAN GO TO?**

- START WITH TRAINING MANAGER – ACCESS TO RUN REPORTS ON DWI STATUS
- WORK WITH TEAM LEAD OR CENTER MANAGER – SAME PROCESS AS ASKING ABOUT POLICY/OTHER QUESTIONS

### **ARE EMPLOYEES ELIGIBLE FOR THESE COURSES?**

- YES! IT’S FREE.
- USE YOUR PROJECT CODE TO ENROLL

### **HOW DOES THE VIRTUAL WORKZ ENROLLMENT WORK?**

- MONTHLY SUBSCRIPTION – IF YOUR PROJECT PURCHASED THIS!
- DWI PROVIDES A CALENDAR (DAYS AND TIMES OF WHEN WEBINARS ARE HELD)

### **DO YOU HAVE A HANDBOOK OR DWI INSTRUCTIONS?**

- WE HAVE A DESK AID THAT WALKS YOU THROUGH THE ENROLLMENT PROCESS
- EXPLAINS BULK ENROLLMENTS

### **MY CUSTOMER IS HAVING TROUBLE ATTENDING WEBINARS FROM THEIR PHONE. ANY HELP?**

- OUR COURSES ARE MOBILE FRIENDLY
- MOST CHALLENGES ARE CUSTOMER INTERNET/CONNECTIVITY ISSUES

- IF THERE IS A TECHNICAL ISSUE, DWI WILL GET AN EMAIL REPORT
- START WITH PROBLEM SHOOTING CONNECTIVITY ISSUES

**WHAT COURSES WOULD YOU RECOMMEND FOR INTERNAL STAFF?**

- EXTREME CUSTOMER SERVICE TRANSFORMATION
- POPULATION SPECIFIC COURSES HAVE LOTS OF VALUE

**DO OUR COURSES HAVE ACCESSIBILITY TOOLS?**

- YES!
- ALL COURSES HAVE CLOSED CAPTION OPTIONS

**LOTS OF CUSTOMERS HAVE LITERACY CHALLENGES AND BASIC SKILL DEFICIENCIES. ARE COURSES MADE WITH THIS IN MIND? CAN MY CUSTOMERS COMPLETE THIS INDEPENDENTLY?**

- PROVIDE A CUSTOMER SERVICE EXPERIENCE
- MOST CUSTOMERS SHOULD BE ABLE TO COMPLETE COURSES BY THEMSELVES
- COURSE-BY-COURSE BASIS\*
- MAKE SURE THE CUSTOMER UNDERSTANDS HOW THIS WORKS BEFOREHAND

**CAN YOU HAVE MULTIPLE PEOPLE ATTEND ONE COURSE?**

- STAFF DEVELOPMENT? YES
- CUSTOMERS? NO
- REMEMBER: YOU WILL NOT RECEIVE A CERTIFICATE FOR COMPLETION IF YOU DO NOT ENROLL YOURSELF INDEPENDENTLY
- CUSTOMERS MUST ENROLL INDEPENDENTLY – EVEN AT PARTNER COENROLLMENTS

**MODULES NOT WORKING ON MOBILE. WHAT DO I DO?**

- [DWISUPPORT@DWFS.US](mailto:DWISUPPORT@DWFS.US)

**ARE THESE CERTIFICATES AND CERTIFICATIONS ACCREDITED?**

- NO, WITH EXCEPTION OF CWDP (NADWP)

**DO YOU HAVE ANY SUCCESS STORIES OR MARKETING MATERIAL THAT COULD HELP 'SELL' THE DWI SERVICES?**

- FOLLOW US ONLINE VIA SOCIAL MEDIA (INSTAGRAM, LINKEDIN, FACEBOOK, ETC.)
- GO TO DWI SITE AND SEE WHAT'S HAPPENING EACH MONTH

**WHAT'S THE BEST WAY TO FACILITATE THE GET PREP'D FOR CUSTOMERS IN A GROUP?**

- BULK ORDER
- INCLUDES 'ACTIVITY GUIDE'
- INCLUDES THREE HANDS ON ACTIVITIES THAT SUPPORT THE VIDEOS INFORMATION
- 45 MIN-1 HOUR WORKSHOP TO SUPPORT THE VIDEO MATERIAL

**DO YOU HAVE ANY BLURBS FOR THE VIRTUAL WORKZ?**

- YES – WE WILL SEND THIS OUT VIA EMAIL

**FREE WEBINARS COMING IN MAY! JOIN THESE!**

