

Appendix J Next Steps Action Planning Tool

SMART¹ Policy Goal Being Addressed: **Customer Input**

Strategies What specific tactics will we use to address the goal?	Key Players Who is responsible? Who else should be involved?	Expected Outcomes What will be the result of these strategies?	Timeline What is the due date of each expected outcome?	Questions and Assistance Needed
<p>1) Develop new tools (right questions about how customers experience service) to obtain feedback that is consistent across partners.</p> <p>a) Develop survey for customers to complete that asks what services/workshops they need</p> <p>b) Develop a strategy for using customer feedback including reporting, and process improvement – review data, discuss at scheduled meetings with front-line staff. Track challenges, services, etc... and see what the outcomes and possible deficiencies are.</p>	<p>OSO & Resource Room front line staff.</p>	<p>a) Written process/strategy to glean feedback to be shared.</p> <p>b) Process implemented.</p> <p>c) Quarterly reports on challenges, trends and needs of customers.</p> <p>d) Discussed at monthly Partner/Staff meetings with agenda item to address customer satisfaction with leadership and staff.</p> <p>e) Improved customer satisfaction.</p>	<p>TBD</p>	<p>Survey customers on how to improve center activities.</p> <p>Consult with WINTAC for support, examples and practices in other AJCs, States. Review approaches from other local areas.</p>
<p>2) Revamp the Customer Profile Form to better identify customers' needs.</p> <p>a) Use the Profile Form as an initial assessment to identify customer needs.</p>	<p>OSO & Resource Room front line staff.</p>	<p>a) Joint procedure and form created, with strategy for use and improvement.</p> <p>b) Faster and more efficient service to the customer.</p>	<p>TBD</p>	

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<p>b) Strengthen the Customer Profile Form to share with referrals so at least a basic level of information can be consistently shared between partners.</p>		<p>c) Better understanding between Partners on the customer from the very start. d) Staff utilize the Customer Profile Form to produce reports to be shared with Partners.</p>		
<p>3) Develop a customer flow chart to identify the pathways from the moment the customer walks through the door to being directed to the appropriate services they need in efficient manner. (Current Service Flow VS Desired Service Flow).</p>	<p>OSO & Resource Room front line staff.</p>	<p>Outputs a) Service Flow map as services currently exist. b) Service Flow map for ideal system and future planning. <i>The Service Flow Chart will be a means to identify the customers' needs and services available to assist them.</i> <i>Will be reviewed for further discussion and make changes as necessary.</i> Outcome: More seamless customer service flow.</p>	<p>TBD</p>	<p>Consider R/R staff duties by function, i.e. IJL, IWN, resume, etc.... Assist customers based on staff expertise for timely quality services. WINTAC</p>
<p>4) Using Customer Feedback to shape service system a) Create a process to share customer feedback with all staff, for their input into desired service flow. b) Review staff input to improve service flow.</p>	<p>OSO & Resource Room front line staff.</p>	<p>a) Customer feedback informs design for seamless service flow. b) Customers able to access more services under one roof. c) Staff understand more about services and make a personal contact to that specific agency.</p>	<p>TBD</p>	<p>This will expand service activities in the IWN Center. Services are driven by customer feedback.</p>

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SMART² Policy Goal Being Addressed: **Staff Capacity**

Strategies What specific tactics will we use to address the goal?	Key Players Who is responsible? Who else should be involved?	Expected Outcomes What will be the result of these strategies?	Timeline What is the due date of each expected outcome?	Questions and Assistance Needed
<p>1) Establish a vision for customer services</p> <p>a) Creating a vision for customer service is our first priority.</p> <p>b) Partners need to come to a consensus on services offered. c) Vision statement will be placed throughout the One Stop Center, i.e., Computer Lab, Lobby, Resource Room, website and other areas.</p>	<p>Partner representatives and front-line staff. (TBD)</p>	<p>a) A written vision statement with training for all staff as the next activity.</p> <p>b) A clearer understanding of vision and services, including the proper training to all staff will allow for continuity for customer and easier customer flow. Identify steps/goals to employment.</p>	<p>TBD</p>	<p>Develop a tool to align services around customer needs. This will encourage real partnership building and better customer service.</p>
<p>2) Establish core set of competencies for staff by function and provide appropriate training – to align with vision for customer services (including “attitude of service engagement”).</p> <p>a) Consider National Association of Workforce Professionals (NAWDP) Certified Workforce Development Professional (CWDP).</p>	<p>Partner representatives and front-line staff. (TBD)</p>	<p>a) Draft submitted to Leadership Team, for review and comment by Full partners. Decision at that point for MOU Center Policy and staff training and implementation.</p> <p>b) <i>Organized training and competencies will allow a more qualified staff that will be better able to address issues with the customers.</i></p>	<p>TBD</p>	<p>Front line staff training: How to diffuse anger, How to ask difficult questions, CPR, Career Exploration, Resume Writing, Understanding Labor Market Information, Reinforce “Attitude of Engagement”, etc.... Agency Services Focus VS Functional Services Focus. TA funding assistance needed.</p>
<p>3) Community Resource Academy.</p>	<p>Partner representatives and front-line staff. (TBD)</p>	<p>a) Completed at a Quarterly Partner Staff Training.</p>	<p>TBD</p>	<p>Training for all front-line Partner staff on the purpose and role of a Community Resource Academy. WINTAC</p>

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<p>4) Develop Activities designed to establish stronger sharing culture with staff across programs (examples: Agency Tours, 10-minute pop-up workshops, shared resource fair activity)</p> <p>a) Develop a monthly newsletter that collects the services/workshops, etc. from all partners and share to all Partners and staff. (build understanding of staff about each other)</p> <p>b) Host a different partner at the IWN Center monthly; have agency set up a table and be present for customers, and/or staff for a tutorial of services.</p> <p>c) Host agency bus tour day for all Partner front line staff to tour all agencies in one day.</p> <p>d) Survey staff to identify knowledge gained and how it will be used in their daily work</p> <p>e) Create a process for staff of all programs to communicate and make suggestions and concerns to management of customer flow, customer service and related issues for continuous improvement.</p>	<p>Partner representatives and front-line staff (TBD)</p>	<p>a) A stronger sharing culture across programs. b) Staff feedback used for future activities c) A process is in place to ensure staff are consulted and engaged, as appropriate in the design of services. d) Process completed.</p>	<p>TBD</p>	
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SMART³ Policy Goal Being Addressed: **System Communication**

Strategies What specific tactics will we use to address the goal?	Key Players Who is responsible? Who else should be involved?	Expected Outcomes What will be the result of these strategies?	Timeline What is the due date of each expected outcome?	Questions and Assistance Needed
1) Finalize referral tracking system process and share information.	All Partner and Partner Agencies with their specific trained agency staff. (TBD)	a) Establish procedure to track referrals from start to finish with a customer.	TBD	Contact other peer LWIB groups or states systems to see if other practical solutions exist.
2) Follow the standard process to identify customers' needs and communicate with related Partners with regard to referrals. a) The Referral Tracking System will allow for a thread from agency to agency to see what each agency has done for the customer. b) Follow customer service process established and provide procedures for front line staff training.	All Partner and Partner Agencies with their specific trained agency staff. (TBD)	a) Develop process to capture referral results. b) Stronger customer service engagement. c) Alignment of services. d) More co-enrollment.	TBD	
3) Create a universal consent form.	All Partner and Partner Agencies with their specific trained agency staff. (TBD)	a) With draft form established for review and approval by Partners.	TBD	Partner Leaders will need to consult with State Agency reps for compliance. Low priority.
5) Create a process and schedule for regular meeting for front line staff (case managers, employment specialists, counselors) of all partner programs with the Business Service Team.	All Partner and Partner Agencies with their specific trained agency staff. (TBD)	a) Regular meeting schedule with standard agenda that provides opportunity for updates, progress sharing in work plan, training on service issues common for all. (BST)	TBD	

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	<p>b) Employment Specialists and counselors are able to connect job seekers with available jobs. c) Shared understanding of job readiness for existing jobs (skills sets required – business expectations).</p>	
<p>6) Create a process to inform staff of change, updates and trends in service design, policies and services to customers.</p>	<p>a) Information is shared on a regular basis. b) Staff evaluation of communication increases</p>	<p>TBD</p>

Appendix J Next Steps Action Planning Tool

SMART⁴ Policy Goal Being Addressed: Ongoing System Improvement

Strategies What specific tactics will we use to address the goal?	Key Players Who is responsible? Who else should be involved?	Expected Outcomes What will be the result of these strategies?	Timeline What is the due date of each expected outcome?	Questions and Assistance Needed
1) Complete the planning process that follows this self-assessment and implement plan.	LWIB Staff to Board/OSO	a) Strategic Plan incorporated into MOU.	TBD	WINTAC
2) Implement plan and discuss progress in LWIB meetings.	LWIB Staff to Board/OSO	a) Individual activities in each goal area will be implemented with ongoing monitoring for improvements and goals reached.	TBD	WINTAC
3) Modify local plans and MOU's to include goals and outcomes.	LWIB Staff to Board/OSO	a) Updated MOU. Review quarterly to stay current.	TBD	WINTAC
4) Modify regional plans to include goals and outcomes	LWIB Staff to Board/OSO	a) Review quarterly to stay current.	TBD	WINTAC

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