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Improving Customer Service
Through Efficient and
Effective Processes and
Procedures

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TABLE OF CONTENTS

INTRODUCTION	2
PROBLEM STATEMENT	4
DATA COLLECTION.....	4
DATA ANALYSIS.....	6
IMPLEMENTATION AND EVALUATION OF THE PLAN	8
SUMMARY AND RECOMMENDATIONS.....	11

INTRODUCTION

The mission of the South Carolina Department on Aging (SCDOA) is to meet the present and future needs of seniors and to enhance the quality of life for older South Carolinians through advocating, planning, and developing resources in partnership with federal, state, and local governments, nonprofits, the private sector, and individuals as stated in the SC State Plan on Aging (2017-2021). The vision of the SCDOA is to provide leadership, advocacy, and collaboration to assure a full spectrum of services, so that South Carolina seniors and/or adults with disabilities can enjoy an enhanced quality of life, contribute to their communities, have economic security, and receive the support necessary to age with choice and dignity. The SC State Plan on Aging (2017-2021) also states that the values established for the SCDOA put South Carolina seniors first, and includes outstanding customer service, excellence in government, person-centered care, teamwork, and research-based decision-making. The SCDOA's values ensure a strong customer focus, accountability, transparency, and collaboration through partnerships. The agency programs consist of Alzheimer's Resource Coordination Centers (ARCC), Eldercare Trust Fund, Supportive Services, Evidence Based Disease Prevention and Health, Family Caregiver, Geriatric Loan Forgiveness, Long Term Care Ombudsman, Legal Assistance, State Health Insurance Program, Nutrition, South Carolina Vulnerable Adults Guardian ad Litem, and the Pet Program. Information about these programs can be found on the agency website, www.aging.sc.gov.

The goal of this project is to determine whether the SCDOA is effectively and efficiently utilizing all resources at the front desk to give exceptional customer service to clients and constituents. SCDOA provides support and resources for programs that help the aging population and adults with disabilities remain in their homes if possible. The SCDOA is considered the State Unit on Aging as defined in the Older American Act. SCDOA staff works with 10 Area Agencies

on Aging (AAAs) to assist with providing services to citizens of South Carolina. Additionally, the agency partners with various organizations throughout the state to give information and referral for services that the aging network provides such as utilities, rent, long term care, and transportation.

Not providing our most vulnerable population with needed services is not an option for the agency. Besides having a moral responsibility to seniors, funding is also provided to seniors for critical services. According to the agency's website, the SCDOA spends approximately \$1,400 per client each year for services to keep clients in their homes longer. Nursing home assistance through Medicaid costs approximately \$52,000 per year. SCDOA receives federal, state and other funds to provide community-based services such as home-delivered and congregate meals, transportation, caregiver services, insurance counseling and home care. GetCare.com, a portion of the SCDOA website, was created in 2017, which identifies resources and services for the senior population and those with disabilities. Using a zip code, seniors, caregivers and adults with disabilities can find available services.; however, sometimes seniors would rather speak with a person and/or may not have access to a computer. This is where the front desk comes in.

Currently, the front desk receptionist is responsible for answering, tracking and transferring calls to the appropriate SCDOA or AAA staff. The receptionist answers incoming calls from 8:30 am to 5:00 pm. After hours calls or calls not answered during work hours are recorded to our voicemail. Other administrative staff works at the front desk during lunch and in the absence of the main receptionist. The Administrative Coordinator is responsible for creating a phone schedule during the absence of the main receptionist, recruiting the administrative staff in other departments. SCDOA receives an average of 687 calls per month. Upon answering the phone, the receptionist greeting is, "Thank you for calling the South Carolina Department on Aging. How may I direct

your call?” The caller may know specifically what their needs are. If not, the receptionist asks a few simple questions utilizing great listening skills to determine the needs of the client. The primary questions asked are the client’s name, county, and the reason for the call. Once that information is received, the receptionist uses a list to determine which AAA serves the county in which the caller resides. Most calls are transferred to the AAA. The AAA is responsible for assessing the client and determining what services are needed. Additionally, every call is tracked in a database system; not only for staff to review, but for the Information and Referral Specialists, Family Caregiver Advocates, Insurance Counselors, and other program staff in the field to assist with helping the client receive services. The database tracks every call and provides a profile of the number of clients, total calls per month, and identifies all staff who were involved with the caller.

PROBLEM STATEMENT

The main goal of the receptionist is to receive calls, transfer calls, and to input all calls into the database. Currently, there are no adequate processes and procedures in place to ensure that the calls have been properly transferred, inputted, and assisted. If these processes were in place, through accountability and controls, the agency can leverage the data and increase effectiveness and efficiency, which would ensure that clients receive adequate services to meet their needs.

DATA COLLECTION

Data collection is defined as “the process of gathering and measuring information on targeted variables in an established systematic fashion, which then enables one to answer relevant questions and evaluate outcomes. The data collection component of research is common to all fields of study including Physical and Social Sciences, Humanities and Business.” In order to test the theory of the problem statement, the following data must be collected, reviewed and analyzed:

1. Total number of incoming calls based on Sprint Communications invoices
2. Total number of calls in the database
3. A list of receptionists and daily schedule
4. Receptionist notebook
5. Create a questionnaire for the administrative staff and recruited program staff
6. Verbal interviews with other staff

The goal of data collection is to determine if the total incoming calls are properly tracked in the database. Additionally, by utilizing a questionnaire, ongoing observations and comments from the administrative staff and others; determinations can be made on how to improve the front desk. The agency currently uses a receptionist notebook filled with various resources to assist callers. The notebook provides frequently called numbers, zip codes by county, State Health Insurance Program phone numbers for each state, weekly Ombudsman intake list and various other information to assist callers. The agency is sometimes considered a “one-stop shop”. It is the staff’s job to provide the necessary information to clients for optimal service, even if it requires a referral to another agency for services.

Most incoming calls are received through the main line, (803) 734-9900. As part of the data collection, the total number of calls for an eleven-month period were located on the Sprint Communications invoices and charted on a control chart. Additionally, a second chart was created to show the total number of incoming calls that were inputted into the database system. The database is designed to capture all incoming calls and voicemails of clients in need of services. Clients are asked to provide the following information: first and last name, telephone number, county, and nature of call. From the total number of calls in the database, a third chart was created

to reflect which AAA the call was transferred to. The last chart shows a differential of Sprint calls to the calls in the database. The charts are contained in Appendix 1.

In November, several employees of the administrative staff were issued a brief questionnaire (see Appendix 2). The questionnaire was designed to provide insight from the administrative staff on processes and procedures for the front desk. Also, various times throughout the project, the administrative staff provided observations and suggestions on ways to improve processes and procedures. Also, additional suggestions and concerns were received by the AAA staff.

DATA ANALYSIS

Data analysis is defined as “the process of extracting, compiling, and modeling raw data for purposes of obtaining constructive information that can be applied to formulating conclusions, predicting outcomes or supporting decisions in business, scientific and social science settings.” In reviewing the data collected and creating graphs to assist in analyzing the data, several findings and appropriate patterns were found. The following list shows the key findings from the data collected.

- 35% of the calls from Sprint Communications invoices were not entered into the database.
- 98% of the database calls transferred were not identified by the AAA receiving the call.
- High volume of calls in October and November represented Medicare Open Enrollment.
- High volume of calls in April may have been contributed to Medicare changes and the upcoming senior day event.
- Calls were identified as simple transfers only. No calls were inputted with ID Type: Voicemail.
- Questionnaires and random comments indicated that the front desk area is extremely noisy, cluttered with outdated furniture; but, referenced materials were adequate to answer and transfer calls.
- Both emails and questionnaires referenced too much time spent as backup receptionist.

- Council of Governments (COGs) and Area Agencies on Aging (AAAs) stated that calls were transferred several times before reaching the appropriate person for resolution.

The findings above may be caused by several contributing factors. Data analysis is a way of understanding the data reported, uncover insights and draw conclusions. Because the agency recruits the administrative staff from each department to operate the phones during the absence of the main receptionist, this could be a considered a contributing factor. This group of employees require proper training and education comparable to that of the main receptionist. Training and education of the administrative staff has been inconsistent. Lack of proper training and education can cause variances in the data input, output, incorrect call transfers, as well as incorrect information provided to clients. It is important that all administrative staff assigned to the phones are properly trained in all aspects of the front desk. Other contributing factors could be caused by resource materials located at the front desk. It is crucial that the information available to the administrative staff be periodically updated. The provision of inadequate information to clients can be detrimental to the services necessary to keep clients healthy and safe.

The questionnaires completed by our administrative staff revealed several factors. Backup schedules that are created by the Administrative Coordinator should be equally distributed as much as possible, so that no one spends too much time on phones as backup and away from their normal job functions. It is also very important that the administrative staff stay focused while answering calls. Noise distractions can cause interrupted and/or dropped calls and misinterpretation of client needs.

Several conversations with the main receptionist throughout this project and analysis of the data collection determined that the ID Type: Voicemail, was not being used. Approximately two hundred calls were not inputted into the database. According to the main receptionist,

approximately 10 voicemails are received per day. Voicemails are retrieved from the main line daily. Upon receipt, calls are routed appropriately based on the information given. Based on 20 business days per month, unentered calls equates to 200 calls per month. Therefore, of the 200 voicemails received, there was no way to track whether client received services or monitor any complaints to effectively achieve maximum efficiency.

Although the data revealed several contributing factors, the data did not provide any insight into complaints by clients. Complaints can assist in providing ways to improve customer service with our clients. Complaints can provide the necessary feedback to create proactive solutions. Currently, the agency does not have a way to track customer complaints in the database.

Council of Governments (COG) and Area Agencies on Aging staff made an observation in reference to how our phones are transferred. The agency currently has a listing of 10 AAAs which are visible at the front desk without using the reference notebook. Calls received through the main line are transferred to the AAAs' main lines. Some AAAs have "live" receptionists like the SCDOA, and others have automated systems. COG and AAA staff are concerned that the calls are not properly received by the program managers to provide services to clients. Calls are either being dropped due in part to the automated systems or passed around several times before reaching the correct person.

IMPLEMENTATION AND EVALUATION OF THE PLAN

To implement the plan to improve processes and procedures for the front desk and to increase total number of calls received and inputted in the database, the following action steps must be considered:

- Extract monthly reports from the database and compare to monthly Sprint invoices. Monitoring can be done either by the Administrative Coordinator or the Administrative Manager.
- Quarterly training meetings with the administrative staff on the database and program updates. First meeting was held during data collection to inform the administrative staff on the questionnaire.
- Allow Administrative Staff to attend conferences and courses to develop skills in customer service and dealing with the public.
- Add a feature in the database to capture complaints immediately after implementation.
- Random surveys and/or emails to the administrative and AAA staff to determine ways to improve or to inquire about concerns. This will be ongoing after the implementation.
- Mandate the Administrative Coordinator to re-evaluate the phone schedule and provide improvements. Suggested improvements will be given to the Administrative Manager one month after implementation begins.
- Update the AAA phone list to include direct numbers to Information and Referral Specialists, State Health Insurance Program Coordinators, Family Caregiver Advocates and Ombudsman one month from implementation. This ensures incoming calls will be transferred based on specific needs of the caller.
- Mandate the Receptionist to review and update the reference notebook quarterly.
- Mandate the Receptionist to create written processes and procedures for handling and transferring calls to be completed within three months of implementation.

Although there are timeframes involved in the completion of the improvements, as stated above, most improvements can be implemented within three months of approval from the Director and/or the Administrative Manager. The cost associated with the implementation should be minimal (i.e. less than \$1,500) for training and education during this fiscal year. The questionnaires did suggest updates to the furniture; but, due to budget constraints, this may not be considered until next fiscal year. The main objective in this project was to show ways to improve customer service through efficient and effective processes and procedures.

Potential obstacles and methods to overcome the solutions may vary by employees completing the task. The receptionist will be going on an extended leave of absence which may require an extension for two to three months. As a result, SCDOA will be hiring a temporary receptionist during the absence period. The temporary employee will maintain current necessary

procedures to provide services and must be properly trained which can be time consuming to the various programs and services the agency offers. The temporary receptionist will be required to continue observing the front desk and making suggestions for improvements. It is said that “fresh faces” provide insights and quality improvements in areas they occupy. This will be a good time to solicit input from someone who is on the outside looking in.

There are various resources required in implementing this plan. Our main resource is the employees of the agency. As stated by the National Fund for Workforce Solutions, “frontline healthcare workers provide routine and essential services in all settings; including hospitals, outpatient care, behavioral health, long-term care, and home healthcare. They represent 50 percent of the healthcare workforce and are responsible for a range of operations including providing administrative, direct care, environmental, and technical services to patients, families, and caregivers. Ultimately, frontline workers form an organization’s backbone which is needed to deliver high-quality care and ensure excellent patient experience.” By providing the necessary equipment and resources, we improve customer service with clients, as well as improve the effectiveness and efficiency of the agency processes and procedures.

To communicate the implementation, a brief meeting will be setup with the Agency Director for his approval and feedback. The improvement plan will then be shared with the Divisional Directors of the agency. Once all are in agreement and any revisions made to the plan, a period of evaluation will take place to monitor the changes implemented. After three months, reports will be re-analyzed and compared to the Sprint Communications invoices to determine any relevant changes to the data. If the data collected from the database has increased and agrees within reason with the Sprint Communications invoices, the agency will consider the

implementation of the plan a success. If the data has changed considerably in the opposite way, the agency will view the results as unsuccessful and require change to the suggested plan.

SUMMARY AND RECOMMENDATIONS

In conclusion, by implementing effective and efficient processes and procedures, the data collection for the agency calls will be more concise and meaningful. Agency staff and others in the field will be able to utilize the data collected by “frontline workers” to better serve the most vulnerable adults and those with disabilities. Furthermore, by educating and training employees more frequently and keeping resources updated; customer service may help keep seniors in their homes longer. Which will in turn, decrease the overall cost associated with nursing home care. For these reasons, it is recommended that the SCDOA implement the new processes and procedures proposed in this report.

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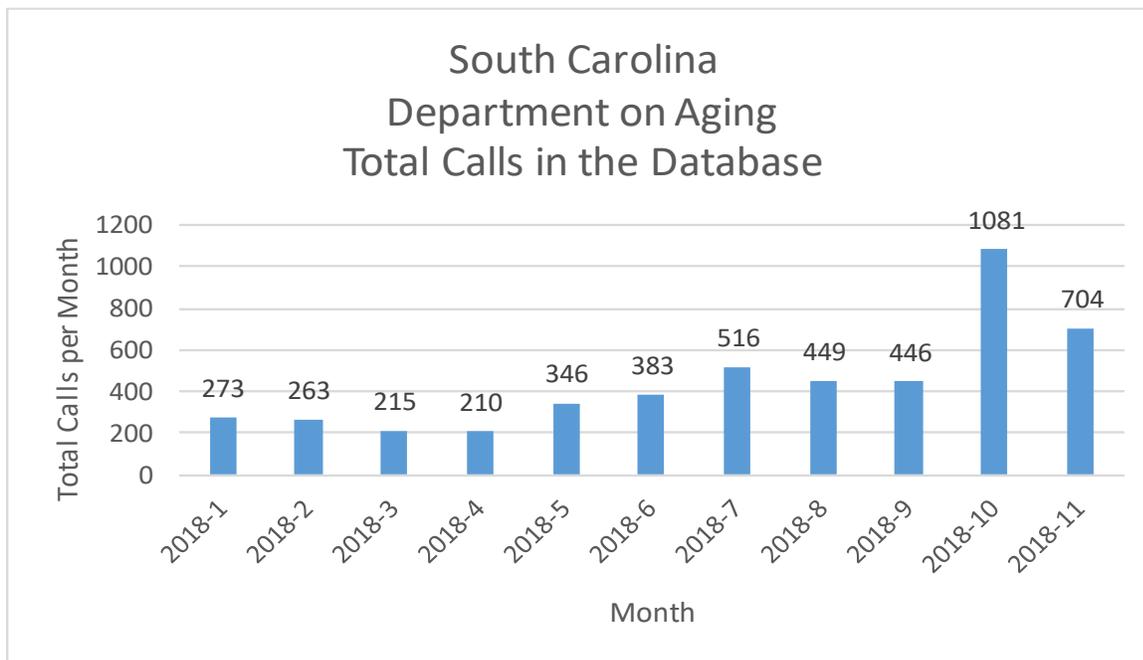
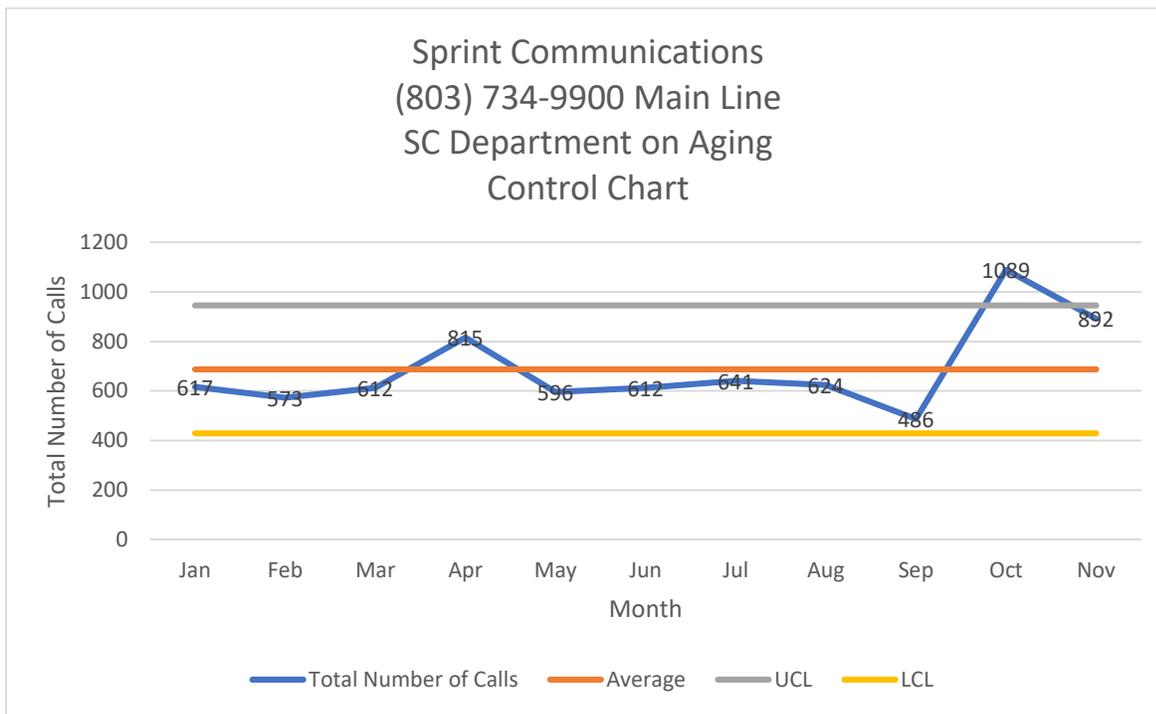
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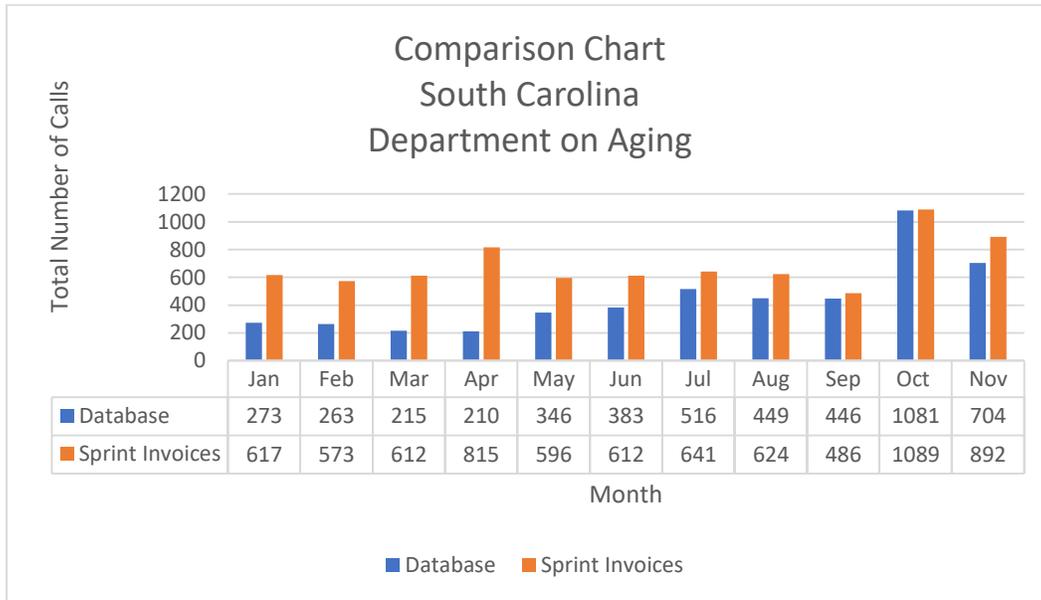
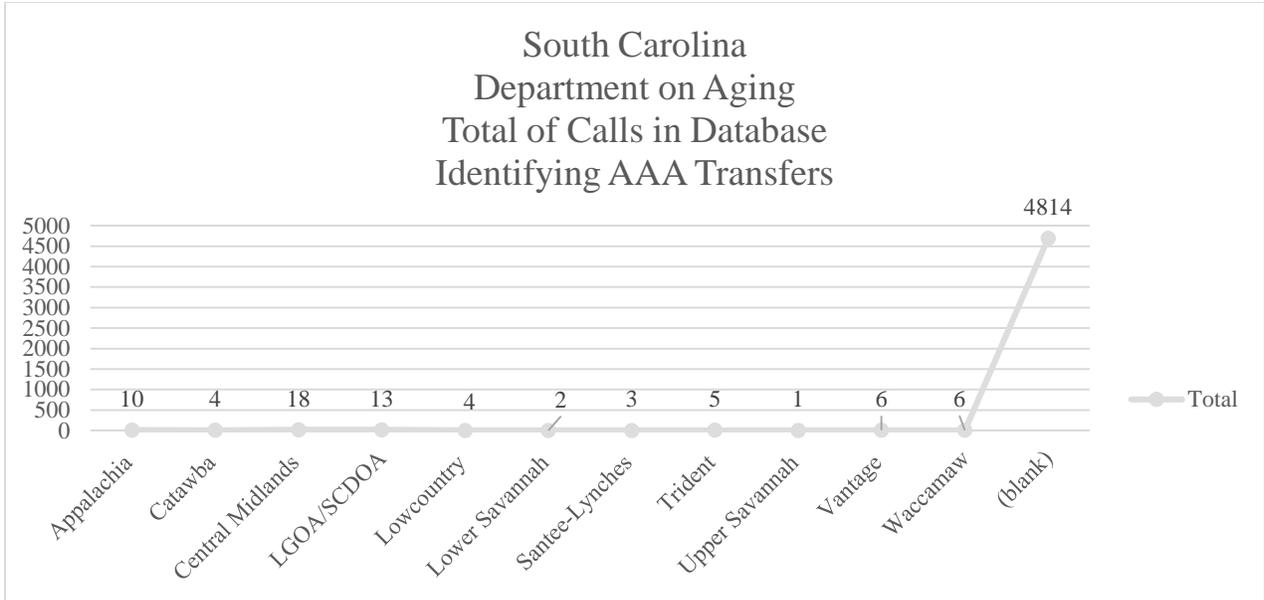
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APPENDIX 1





APPENDIX 2



This short survey questionnaire is designed to provide insight from the administrative staff on our process and procedures for the front desk. The survey will be used to improve quality of service and will be kept confidential.

On a scale of 1 to 10, how important is the front desk to you? (10 being extremely important)

Do we need to make any changes to how the phones are answered? (i.e. “Thank you for calling the Office on Aging, how may I direct your call?” If so, what is your suggestion?

Do you have adequate information to answer the calls and forward properly? If not, explain information needed to answer calls?

If you are backup to the phones, do you feel you spend too much time as backup? If so, how can we improve the process?

Have you ever done a follow up call to ensure the client received assistance needed? Do you feel this is needed?

Finally, is there anything else you'd like to add about the process and procedures of the front desk.

We really appreciate your assistance.

Do you have any additional questions or comments?