Trainer Manual Guidelines

This manual provides a step-by-step approach to training on *Reengineering Your One-Stop.* This session is the third in a series of five training modules designed to help local workforce development agencies collaborate to improve customer services. The complete curriculum on *Local Partnership Building* includes:

- Module 1. Transitioning to a WIA One-Stop
- Module 2. Partnering and Organizational Change
- Module 3. Reengineering Your One-Stop
- Module 4. Customer Feedback and Continuous Improvement Under WIA
- Module 5. Developing a Customer Satisfaction and Continuous Improvement System for Your One-Stop

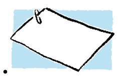
Each module has a series of companion products. In addition to this trainer manual, products developed for Module 3 on *Reengineering Your One-Stop* include a microdisk of the Microsoft PowerPoint presentation.

The best place to start with this guide is to read it through once. The guide is designed to be easy to understand. Following are points for reading and using the guide.

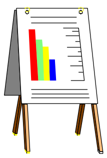
> Sentences typed in ***bold Italics*** are intended to be <u>said by the trainer to the group</u>.
>
> Sentences with a bullet in front of them are <u>action items</u> that the <u>trainer needs to do</u> them are <u>action items</u> that the <u>trainer needs to do</u>.

Icons on the left-hand side of the guide provide a visual view of the type of activity that is taking place. The Icon Key is provided below.

- Use overhead slide (number). The numbered slides will be in a separate handout.

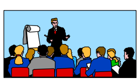


- Have participants complete exercise.

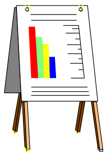


- Write information on flip chart.

- Use small group work/discussion.



- Use full group discussion.

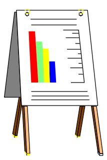


- Write "Welcome" and your name and phone number on a flipchart at front of room prior to attendees arriving. Also include your e-mail address if you have one.

WELCOME! Glad you can all be with us today.

Introduce yourself and give a brief description of your background and qualifications to lead this training module.

- Put on title overhead.



- Ask individuals to say who they are, where they are from, and what they expect from the workshop. Write the answers on a flip chart. Hang the participant expectations on one wall to remind you of what should be covered.

- Put on overhead 3.2.

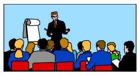
This session is intended to provide an overview on service redesign, including tools, techniques and some hands-on activities.

- Put on overhead 3-3.

Let's take a look at six principles for redesigning one-stop services.

- Read overhead 3-3.

This principle brings the important element of "customer focus" into play. What might be some examples of looking at services from a PROGRAM perspective?



- Use full group discussion.

- Seek volunteers to provide examples. If no one volunteers suggest one or two ideas: 1) We need to fill a data entry class with dislocated workers; 2) Mr. Employer I do job development for older workers only – please place one!

- Put on overhead 3-4.

When we begin looking at our business in terms of the "customer perspective" we might do so by thinking about these four steps:

- Read overhead 3-4.

- Put on overhead 3-5.

The new redesigned world will have customers taking responsibility for setting their own individual career goals. Customers will guide the delivery of services.

The third principle is to provide good information to support informed customer choice. This particular principle is a major shift in how we do business. We essentially are shifting from "giving people fish" to "teaching people how to fish". Our skills shift from telling people what to do to a coaching and mentoring role of providing as much good information as possible so that our customers can make INFORMED decisions.

- Put on overhead 3-6.

- Read overhead 3-6.

This fourth principle reminds us that different levels of intensity will help us tailor our services and serve more with less!

- Put on overhead 3-7.

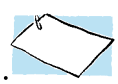
- Read overhead 3-7.

The concept of pooling resources can help you focus on customers by broadening the possibilities.

- Put on overhead 3.8.

Has it been a common practice to actually ASK customers what services they want and to actually use customer feedback to improve services? Probably not! We have from time to time done customer surveys. Can we honestly say we have used the information we get to change the way we do business?

Module 4 will spend time looking at customer feedback systems in more detail.



- Have participants complete the following exercise.

ACTIVITY 1

Role-play: You are a job seeker with specific needs. Introduce yourself to the rest of your group and identify some of the services you want from your One-Stop. Choose a record-keeper to record the needs of all the job seekers and report back. The facilitator notes the needs on <u>2 flip charts</u>: Services currently available and Services need

- Put on overhead 3-9.

- Read overhead 3-9.

These intended results require skills and knowledge in the area of process reengineering.

- Put on overhead 3-10.

- Read overhead 3-10.

Service reengineering tools can help all the partners focus on customer needs and expectations and appropriate changes rather than on "turf" or program specific issues.

This is an important technique and will provide tools to assist your one-stop business in meeting the challenges of the new Workforce Investment Act.

- Put on overhead 3-11.

- Read overhead 3-11. Discuss as appropriate.

- Put on overhead 3-12.

- Read overhead 3-12. Discuss as appropriate.

These Workforce Investment Act challenges…

- Put on overhead 3-13.

…provide us with an opportunity to create a system that comes up with multiple answers. Remember – ONE SIZE DOES NOT FIT ALL. We have to creatively learn to do more with less and deal with customer focused needs and expectations.

- Put on overhead 3-14.

The individuals you pull together for a reengineering exercise should involve both internal and external members.

- Read overhead 3-14

- Put on overhead 3-15.

As the intensity of the services increases (from left to right), the number of customers needing that level of assistance decreases between self-service and staff assisted services.

- Read overhead 3-15.

- Put on overhead 3-16.

- Read overhead 3-16.

If we look at the Workforce Investment Act requirements related to services, here are some of the points to consider.

- Put on overhead 3-17.

- Read overhead 3-17

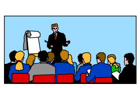
- Put on overhead 3-18.

- Read overhead 3-18

The reengineering process can develop and enhance partnerships that lead to good effective collaboration.

- Put on overhead 3-19.

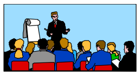
What is reengineering?



- Use full group discussion.

- Ask for someone to read the bullet points. Facilitate discussion on what this all means related to the job.

- Put on overhead 3.20.



- Discuss Purpose of slide 3-20.

SIMPLY BETTER - "SERVICE BY DESIGN"

- Put on overhead 3.21.

- Discuss slide 3-21 The Process

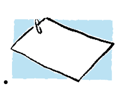
- Put on overhead 3.22.

Step One: The Opportunity – Slide 3-22

When selecting an area for reengineering, there are several points to consider. Do you want to work on an area that will show quick results, or not require much staff time, or make a dramatic impact over time?

If you are most interested in a big payoff, these are some criteria you might consider:

- ***Effect on the largest number of customers***
- ***Receipt of the largest number of complaints***
- ***High costs per customer served***



- Have participants complete the following exercise.

ACTIVITY:

- Split the groups into 3 teams.

- Ask each individual team to print in big letters on a flip chart sheet the name of a customer group: Job seekers plus, employers, or youth. Attach the sheets to the wall in different areas of the room.

- Ask each team to list each partner product and service, one per post-it note, by individually brainstorming – they have a 15-minute time limit.

- Without talking, have the groups randomly post their ideas on the wall under their own heading.

- Without talking, have them collectively sort the ideas in categories/ groupings. Make duplicates of ideas as necessary to put into several groupings.

- Using consensus, develop header/ theme cards for each of the groupings/ categories. Place at top of grouping and place box around it to distinguish it from the ideas.

- Review the affinity. Sequence the groupings/ categories as necessary.

This system of organizing data is a tool known as the affinity diagram. When the area to be prioritized is chosen, a statement should be written to explain the scope of the task.

- Put on overhead 3-23.

Step Two: Thought-to-be – slide 3-23.

Reliability, responsiveness, assurance, and empathy are examples of attributes known to influence the quality of customer service transactions. Availability, accessibility, and timeliness of services are attributes known to influence the quality employment and training services. How customers experience attributes define the quality of a cycle of service.

- Put on overhead 3-24.

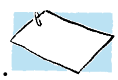
Let's look at the some of the characteristics of these attributes:

1. ***Delivery - Is service provided by self-service, as part of a group or one-on-one?***
2. ***Access – Is there an eligibility factor?***
3. ***Availability – Is service available on-site or by referral?***
4. ***Responsiveness – What level of service/ resources would satisfy the customer? Do we provide this quantity?***
5. ***Timeliness – How often is the service available? Immediately or weekly?***
6. ***Reliability – Are we able to perform the promised service dependably and accurately? Always? Sometimes?***
7. ***Tangibles – Are tools, facilities, equipment and materials that the customer would expect to be able to see evidence of in place?***
8. ***Assurance – Do the knowledge, courtesy and ability of the staff convey trust and confidence?***
9. ***Empathy – Does our service provide customers with caring, individualized listening and direction?***

- Put on overheads 3-25. Also refer to handout of slide 3-25.

- Slide 3-25 – shows examples of these attributes detailing the characteristics of how these services are provided.

Ranking the key quality attributes is the next step. In order to arrive at this decision, a technique known as Dot Voting may be used.



- Have participants complete the following exercise.

ACTIVITY:

- Each of the 3 groups will prioritize the quality attributes from the customer perspective for the following services –

  - Provide job listings

  - Provide job search workshop

  - Refer to vocational skills training

- On a flip chart, have each group write the service heading for their group. Down the left-hand side, write out the 9 quality attributes, with a characteristic definition next to it, i.e. access – universal. Allow 5 – 10 minutes for this. Each participant then receives 5 dots to assign against the qualities they feel would be most important to the job seekers. If one item seems overwhelmingly important, an individual may cast all his/her votes for that item. Allow 5 – 10 minutes for voting and reporting back.

- Put on overhead 3-26. Refer to Handout 26.

Slide 3-26 – an example of this.

This technique gives us an overview of services from the staff perspective, but as it is imperative to listen to the voice of the customer, they must now be brought into the picture.

- Put on overhead 3-27.

Step 3 – Ought-to-be – Slide 3-27

The steps for gathering customer feedback will be covered in more detail in module 4, but the process begins with a customer satisfaction survey. When the information on importance and satisfaction ratings of quality attributes is gathered, it needs to be drawn together in a chart called the "Customer Window". The process starts by calculating an average interviewee rating for each importance attribute and each satisfaction attribute. Customers rank how important and how satisfied they are with each attribute on a scale of 1-5.

- Put on overhead 3-28. Refer to Handout 3-28

Slide 3-28 – an example of this.

The results are plotted on 2 axes in a Customer Window chart to determine which attributes need to be prioritized from the customers' point of view. The chart is separated into 4 quadrants.

- Put on overhead 3-29. Refer to Handout 3-29.

Slide 3-29 – an example of this.

An initial interpretation for the meaning of each quadrant in the Customer Window is as follows:

Quadrant A: Attention. Higher importance and lower satisfaction— Want and don't get. Customers want these attributes but are not getting them. The Voice of the Customer says that this quadrant contains targets for improvement. In the example, customer ratings placed these attributes in the "pay attention" quadrant:

• Timeliness Can get service immediately

• Access/universal Openness to all customers

• Responsiveness Can get 10 to 20 good job listings

Quadrant B: Bravo! Higher importance and higher satisfaction— Want and get. Customers want these attributes and are getting them. The Voice of the Customer says, "Keep up the good work!" In the example, customer ratings placed these attributes in the "Bravo!" quadrant:

• Empathetic staff Listening and helpful staff

• Assuring staff Assuring, confident staff

Quadrant C: Cut or communicate. Lower importance and higher satisfaction — Don't want but do get. Customers seem to say that they are getting these attributes, but don't think they are particularly important. It may be that customers don't understand what they are getting. The Voice of the Customer says either cut down on these features or communicate why they are important:

• Availability On-site availability of service

• Tangibles Use of the computer job bank

This kind of finding can be disturbing. The team feels it would be difficult to provide a job listings service without

the computer, and matching listings just makes sense. The finding probably means that Team One needs to communicate better with customers about the wonderful computer that is working on their behalf.

Quadrant D: Don't worry. Lower importance and lower satisfaction — Don't want and don't get. Customers are not particularly satisfied, but they don't perceive these attributes as particularly important, either. The Voice of the Customer says that no action is needed here. SxD advises you to interpret these attributes carefully. In the example, customer ratings placed these attributes in the "Don't Worry" quadrant:

• Delivery mode	***Self-service delivery***
• Reliability	***Service reliable most of the time***

Our example shows how SxD teams can use the Customer Window to interpret the "voice of the customer." Four additional distinctions are useful to keep in mind when interpreting the voice of the customer:

- ***Voluntary customers and trapped customers***
- ***Customer service and customer satisfaction***
- ***Service quality and product quality***
- ***Service quality and service value***

This chart clarifies the customers' expectations, and their perception of the service delivery they are receiving.

The areas the staff felt were most important need to be compared with the issues which fall in Quadrant A of the Customer Window – Higher importance and lower satisfaction (Want and don't get). The customer results could be summarized in a short statement of the job seeker's expectations. For example "I can walk in and count on viewing job listings immediately. With a little assistance, I can quickly get 10 – 20 job listings I might qualify for."

- Put on overhead 3-30.

Step 4 – Reality – Slide 3-30

Use of a guest shopper allows us to learn what the actual cycle of service is and whether it is delivering what the customer wants. The guest shopper writes a transaction-by-transaction narrative of how he/she experienced the service being assessed. Then the sequence is put into a diagram format –

- Put on overhead 3-31. Refer to Handout 3-31.

Slide3-31. The cycle of service diagram includes an analysis of process and cycle times. Process time is the number of minutes it takes to complete a transaction.

Asking the following questions can then assess results:

- ***Which transactions stand out?***
- ***Which are the longest transactions (or activities)?***
- ***How long does it take to complete the whole cycle of service?***

Measuring the capacity of cycles of service can help identify bottlenecks among interrelated services. Balancing customer flows and reducing cycle time may become an important improvement for your team.

IDENTIFY VALUE ADDED TRANSACTIONS

Some transactions are more valuable to customers and some are of more value to the service provider. Using information from the cycle of service diagram to identify different kinds of transaction value is called "value-added" analysis. Quality experts tell us that three kinds of value are created by transactions:

- ***Customer-Value-Added (CVA) -- transactions where the customer receives a service or product that creates value for the customer (e.g., a job-finding workshop, a resume, a job referral).***

- ***Business-Value-Added (BVA) -- transactions that are required to conduct business but that add little or no value for the customer (e.g., eligibility determination, completing an application, taking a test).***

- ***No-Value-Added (NVA) --transactions that create no value for the customer or business (e.g., waiting lines and waiting lists) and in many cases add to costs (e.g., lost opportunity costs, inventory-carrying costs).***

When your team has assembled a cycle of service diagram that represents the sequence of transactions experienced by the guest shopper, address these questions:

- ***Which transactions in the cycle of service add value for the customer?***
- ***Which transactions in the cycle add little or no value for the customer?***
- ***How long does it take before the customer gets value-added services?***

Cycle of service, cycle time, and value-added analyses will help your team identify specific gaps between customer expectations and reality. The combination of these sources of feedback will allow you to analyze the gaps in the service – slide 3-32.

- Put on overhead 3-32. Refer to Handout 3-32.

- Put on overhead 3-33.

Step 5: Generate – slide 3-33

Root causes of cycle of service gaps generally come in 3 broad categories:

- Process problems: the process does not produce the kind or quality of transactions your customers want
- Communication problems: Customers are confused about what you offer or how to find your services
- Standard problems: No (or low) operational standards exist for a service important to your customer

Most of the problems caused involve process gaps between what customers want and what the cycles of service deliver. The steps to close process gaps are as follows:

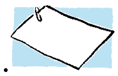
1. Identify and rank the most influential causes of process problems
2. Tested tools are used to analyze the root causes of process problems
3. Improvement ideas are generated to address specific root causes by simplifying processes and reducing the opportunity for defects

For the identification, review the results of the earlier work done on the guest shopper analysis, the customer service satisfaction surveys, and the cycle of service analysis.

ACTIVITY:

Let's go back to the Cycle of Service diagram and try to identify some of the possible causes for process gaps.)

- Put on overhead 3-34. (Same as overhead 3-31)



- Have participants complete the following exercise.

Divide into 4 groups. You have a time limit of approx. 10 minutes to brainstorm all the possible causes for each gap, using suggestions from the whole team on a flipchart. Remember there are no bad or wrong ideas when brainstorming! The purpose is to develop a large volume of ideas, which can be edited later.

When the groups have finished brainstorming, list the ideas onto 4 separate flipchart sheets under the following major category headings:

- *Methods and procedures*
- *People*
- *Equipment and materials*
- *Information*

Using a round-robin, assign each cause to a major category until all possible causes are organized.

The next task is to look for relationships among possible causes to determine the most probable causes. This may be decided by consensus based on judgment, experience and shared discussion. Other tools that may help with this task include Fishbone diagrams, which find possible causes, and Pareto charts, which help to rank them. Refer to Handouts 3-1 and 3-2.

The next task is to narrow down the root causes of the problem by asking the question "Why?" five times – slide 3-35.

- Put on overhead 3-35. Refer to Handout 3-35

Methodically ask and answer successive questions that go deeper into the causes of the gap. The first level "Why?" is generally one of the major gap statements developed previously. The fifth "Why?" often points to a solution.

- Put on overhead 3-36.

Step 6: Evaluate – slide 3-36

Before service improvements are implemented, there needs to be a testing period to ensure that the planned changes will produce the desired results. A test plan needs to be drawn up to document tasks needed for testing, criteria to measure the success of the test, and who will carry out the steps, when, where and how. Show Slide 3-37.

- Put on overhead 3-37. Refer to Handout 3-37

Testing is designed to bring problems to light, so things that go wrong in testing are not bad news. They are what the tests are designed to bring to light. At the end of the test, revise the planned improvements, and share the results with management and others in the organization

- Put on overhead 3-38

Step 7: Activate – Slide 3-38

Implementation of the improvements is the final step. Some questions need to be asked to help plan the implementation process.

1. What changes in the present system are needed to implement the improvement?

   • How quickly should the changes be made? Draft a time line.

   • In what order will the changes be scheduled?

   • Identify the ordered set of implementation tasks/steps for each improvement.

2. What approvals, buy-ins, and partner involvements are needed?

   • What is the strategy for getting the approvals, buy-ins, and partner involvements?

3. Who will be responsible for what — when, where, and how?

   • Identify the person responsible for each step.

   • Draw up a table listing the who, what, where, when and how for each implementation step.

4. What strategies will you use to surmount major obstacles?

   • Address issues and resolutions that came out of the test step.

   • Plan for monitoring and working out problems.

5. How will you make any needed staffing changes?

   • Establish schedule and objectives for communication and training.

   • Discuss any new working arrangements, location shifts, etc.

6. Are any equipment and facility changes needed?

• Set a schedule and objectives.

• Discuss procurement arrangements, etc.

Work through the suggested questions and then draft an improvement implementation plan.

- Put on overhead 3-39. Refer to Handout 3-39.

Slide 3-39. Other people may need to be added to the original planning team in order to facilitate the implementation – add in staff whose work would be affected by the planned changes.

Start-up activities will include the following: Brief management on the implementation plan. Complete necessary changes in forms and paperwork ahead of time. Carry out all the staff training. Set and honor new launch dates, to mark progress and confirm to the unsure that the new ways of operating are expected.

Monitor the improvements: Front-line staff should have primary responsibility for measuring results and fine-tuning service improvements. The team needs to ensure that it is closing the gap between customer needs and actual services. Take the time to review the changes with affected front-line staff and the customers. If standards for transactions were set, these should be measured weekly at first, then monthly. When the team has results that match its expectations, the improvement loop is complete, and the team can move on to another improvement area, after taking time to congratulate themselves!

Here are some examples of reengineering job placement/job search activities.

- Put on overhead 3-40. Refer to Handout 3-40
- Read overhead 3-40

- Put on overhead 3-41. Refer to Handout 3-41
- Read overhead 3-41.

- Put on overhead 3-42. Refer to Handout 3-42
- Read overhead 3-42

- Put on overhead 3-43
- Read overhead 3-43
- Ask participants to complete a course evaluation form.