**Workforce 3One**

**Transcript of Podcast**

**WIOA-Customer Centered Design**

**Part 1**

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VIRGINIA HAMILTON: Hello and welcome to the Innovation and Opportunity Network podcast series. My name is Virginia Hamilton. I'm the region six administrator for the U.S. Department of Labor, Employment and Training Administration here in San Francisco.

In today's podcast we're going to explore the concept of customer-centered design, or human-centered design.

Fundamentally, customer-centered design is a set of methods that you can use to gain a deep understanding of the customers we're looking to serve, their needs, their resulting behaviors, and developing lots of ideas to create innovative new solutions, rooted in what is actually needed to achieve individual employment goals as opposed to following more traditional and maybe potentially outdated thought and process patterns.

The implementation of the Workforce Innovation and Opportunity Act gives us a huge opportunity to step back from business as usual and with the customer in mind design services, processes, and sometimes even physical space within One-Stop centers in a way that will produce better outcomes for customers and higher customer satisfaction.

By using this approach we can develop plans in a different way, not with the law and the regulations in the center, but with the customer in the center. What we're looking at here at the Department of Labor are real innovative approaches to implementing this new law and not just a checklist implementation plan.

Several areas in our region here in San Francisco participated in customer-centered design training. They're going to discuss a few of their experiences and how it's impacted operations on the front line. We're going to hear how they used the customer-centered design approach step-by-step to create a participant intake process that resembles the idea of speed dating.

Our first guests are Robin Purdy and Diane Ferrari. Robin is now a consultant with the California Workforce Investment Board, and she focuses on developing customer-centered workforce policies. Diane is the chief of the northern division of the California Employment Development Department.

Robin and Diane, take it away.

DIANE FERRARI: Sure. We were invited by DOL region six about three years ago to come to San Francisco and participate in a customer-centered design training with local workforce investment boards and employment development departments, workforce services branches from all over California.

So we went and we didn't really know what to expect. But when we got there we were taken through a two-day project where we asked ourselves the question, "How might we improve services for long-term unemployed and dislocated workers in California?" And kind of put ourselves in their shoes, listened to stories from customers of the job center system, and then participated in some quick prototyping of services that we felt might help them better engage with our system.

And basically we were told that there were no parameters. We could design whatever we wanted to, however we wanted to, and don't worry about the details but focus mostly on the improving the customer service as they come in. Design it however we wanted to and then we could work out the details later. And it was kind of a fun interactive process.

Not only was it participants from a rural area but it was also metropolitan areas. Everybody's viewpoint was a little bit different on how customer-centered design should actually take place. We kicked around a couple of ideas – and I'd actually heard something on the radio that morning talking about speed dating. So I suggested to Robin, what about a speed orientation or a speed workshop? We started just throwing out ideas on the similar concept of speed dating.

ROBIN PURDY: The idea was to engage the customers in the process of finding out why they were there, where they were in their own job search. We had gone through what are the emotional modes of unemployment and what phases do people go through, so we kind of had a framework.

Then we thought, well, as customers interviewed each other and then reported out, staff wouldn't be managing the process; they would be more like listening to it and then could step in and offer suggestions for a way that each person might improve their job search options.

So that's what we came up with. We presented it to the group. Then at the end of the training, of course, Virginia and Diane and Brian were like, well, go home and do it. So we came home and passed on our wonderful idea that we had made up in probably less than an hour on to the staff of the Sacramento career center in Hillsdale, and I believe there was also some staff from the Sacramento Works! career center at Mark Sanders.

So both of those groups took it. Then, because the focus is supposed to be the customer, they took it out to customers and our speed dating idea morphed into an idea that our staff and customers came up with that is still in use today in the job centers.

MS. FERRARI: And we did go through a whole process where we wrote it out, we flowcharted it; we took a look at how the customer would interact through the design. I think we came up with some really good ideas, some that worked, some that we figured not only could we not implement, we probably could not afford to do it at that great a level and came down to the actual process that is still working today.

And we were also concentrating on the focus of our integrated service delivery. We wanted to make sure that we did not degrade our service delivery at all, but still focused on the customer and made sure that the experience was what they needed but at the same time made sure that we still adhered to what we've had to report back to Department of Labor.

MS. HAMILTON: Thanks, guys. One of the aspects of customer-centered design is really to encourage those wild ideas and to come up with things in quantity. So Robin, when Diane mentioned to you the idea of speed dating, what was your reaction and how did that conversation happen to take it to something that was implemented into the center?

MS. PURDY: I was horrified. (Chuckles.) But then as I thought about it – horrified because the idea of the speed dating thing doesn't really resonate with my personality type.

But once we started talking about it, it was the interaction and kind of passing on something that's always been important to us in Sacramento, is to provide services that are customer-focused and that engage the customer so that they take ownership over their own plan, and then the staff acts as guide or coaches to help them get to the places where they want to go. We really focus on that.

And so when we started talking about the idea of the speed dating it fit so well into that, of the customer being in the power position, talking about who they are to another customer; reporting out what their needs are, where they are in their job search; and then having staff help them get there. That really resonated with me.

MS. FERRARI: I think one of the things that became apparent was that as people come into our centers, they're at different places at different times. The way that we were funneling individuals through, we were assuming that everyone was in the same place at the same time.

And what the speed dating did was it gave you that five-minute concept of a very quick service and then you move on, a quick service and then you move on. Some individuals need more time in one place versus another, and this concept allowed them to move forward when they were ready.

So like Robin said, it gave them the power to either pause where they were or to move on more rapidly through the system so that they could ultimately get to what their career goal was.

And one of the cool things about this customer-centered design that we went through is that they teach you tools for not shutting down somebody else's idea, but to add a "yes and" instead of a "no but." So when Diane threw that out, even though internally I was like – you know, we worked it through a positive process to get to some place that we thought would be a good way to proceed with our customer.

MS. HAMILTON: So you attended a meeting and you came up with this concept, and so you came back to your organization and you turned it over to the staff. So can you talk a little bit about what are the improvements they made upon the idea? How do you see that affecting your workshops and other services? And also, what was the process like when you came back and said, guess what, guys? We're going to do speed dating in a One-Stop.

MS. PURDY: We invited staff members to a meeting with us when we came back, and we were all charged about our idea because it was so great. We laid out the idea to staff and we asked them to take it and improve upon it – take it back, think about it.

Then they met for probably a month, a month and a half without us. I understand now that they were a little nervous about changing our idea; did we really want them to tell us that our idea might not be the best way to do an orientation? So that was kind of interesting. I would hear that filtered up from other staff and the managers.

But Diane and I were clear that we really didn't own this and didn't want them to implement our idea; that we wanted them to take it and make it something that would work for them in their daily work. And they did that.

When we came back for them to present what our idea had morphed into – and I think they were a little nervous – we both really liked what came out of it.

MS. FERRARI: And the questions, we made sure that we continued what we had learned in the whole process. We didn't say "no but;" we would ask them "and how" but didn't shut down any ideas. The brainstorming continued; it really did, and the process continued also.

And still to this day, when we change things within our local area we look at the customer-centered design and implement whatever we need to, but continue the process approach.

MS. PURDY: Yeah. And then last fall, had a team of staff with coaches who went through the online customer-centered design training. They are continuing to use that. I think it's becoming, as Diane said, fully integrated into how we do business in Sacramento.

MS. HAMILTON: How do you choose which staff once you brought the idea; but also, are you including your partners as you're having these teams certified?

MS. PURDY: I think it was volunteer. We took volunteers. In California there's a term called "coalition of the willing" that's often used. You start with the people who are willing to embrace change and then you slowly move it outwards until the culture's changed.

MS. FERRARI: I think we also looked a little bit at below and where our staff fit into the areas that we really were looking for improvement, and all of them creative thinkers and thinking out of the box to come up with new and innovative ideas on the one little kernel, the one little see that we actually planted, and then they just grew and built off of that.

MS. HAMILTON: Thanks, ladies. I think that's a great end to segment one.

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