

*We focus on the person,  
not the problem.*

Direction Home Akron Canton Area Agency on Aging and Disabilities

Resource Center: 877-770-5558

New: online referrals at [www.dhad.org/refer](http://www.dhad.org/refer)

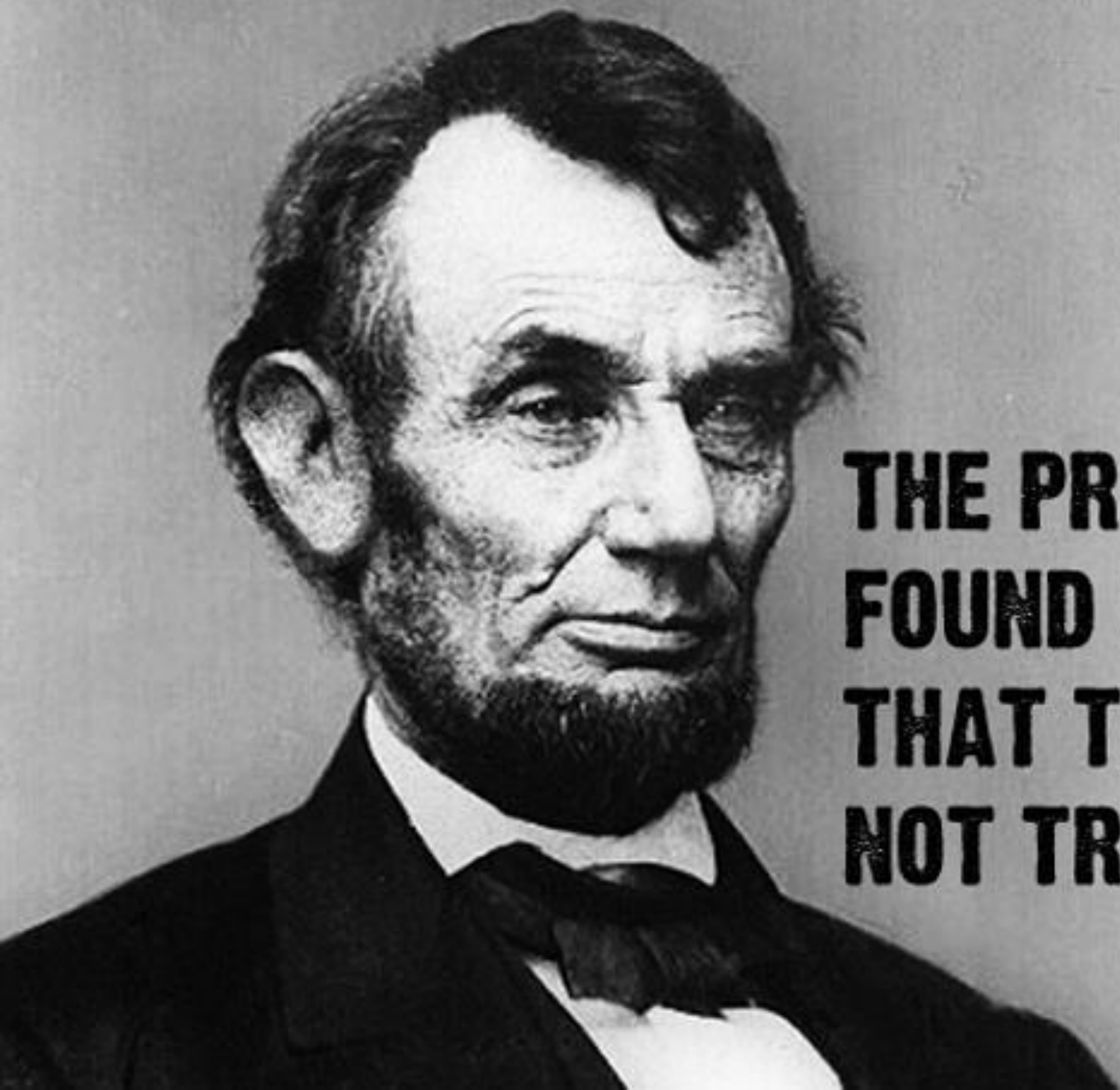


# OBJECTIVES

In this session we will:

- ❖ Discuss the drivers and motivation behind taking a deep dive into internal process improvement to enhance customer experience and satisfaction
- ❖ Identify the importance of business intelligence as a driver for infrastructure redesign and new business development support
- ❖ Review a Case Study of the ADRC Redesign utilizing LEAN Six Sigma Methodology





**THE PROBLEM WITH QUOTES  
FOUND ON THE INTERNET IS  
THAT THEY ARE OFTEN  
NOT TRUE.**

**-ABRAHAM LINCOLN**

# WHO WE ARE



- ❖ Private, non-profit
- ❖ 230+ employees
- ❖ 4 county region
- ❖ 7,400 individuals served





# A CASE STUDY

Direction Home and Quality Improvement

## ADRC Redesign

# WHY A REDESIGN OF THE ADRC ?

- Growth
  - ADRC is the nucleus
    - Where everything starts
    - First impressions
  - Case Management Rocks!
    - Relationships
    - Programs
  - Support
    - Listening to those on the front lines
    - Meeting the needs of our ADRC
      - Tools
      - Team Continuity
      - Materials for success





# WHY A REDESIGN OF THE ADRC ?

- AAA's
  - Federal and State funded
  - Payer Contracts
  - Grants
  - Old American Act
- We have competition
  - Electric Company
  - Banks
  - Hospitals
  - Private for-Profit Businesses - Hungry



# WHY A REDESIGN OF THE ADRC ?

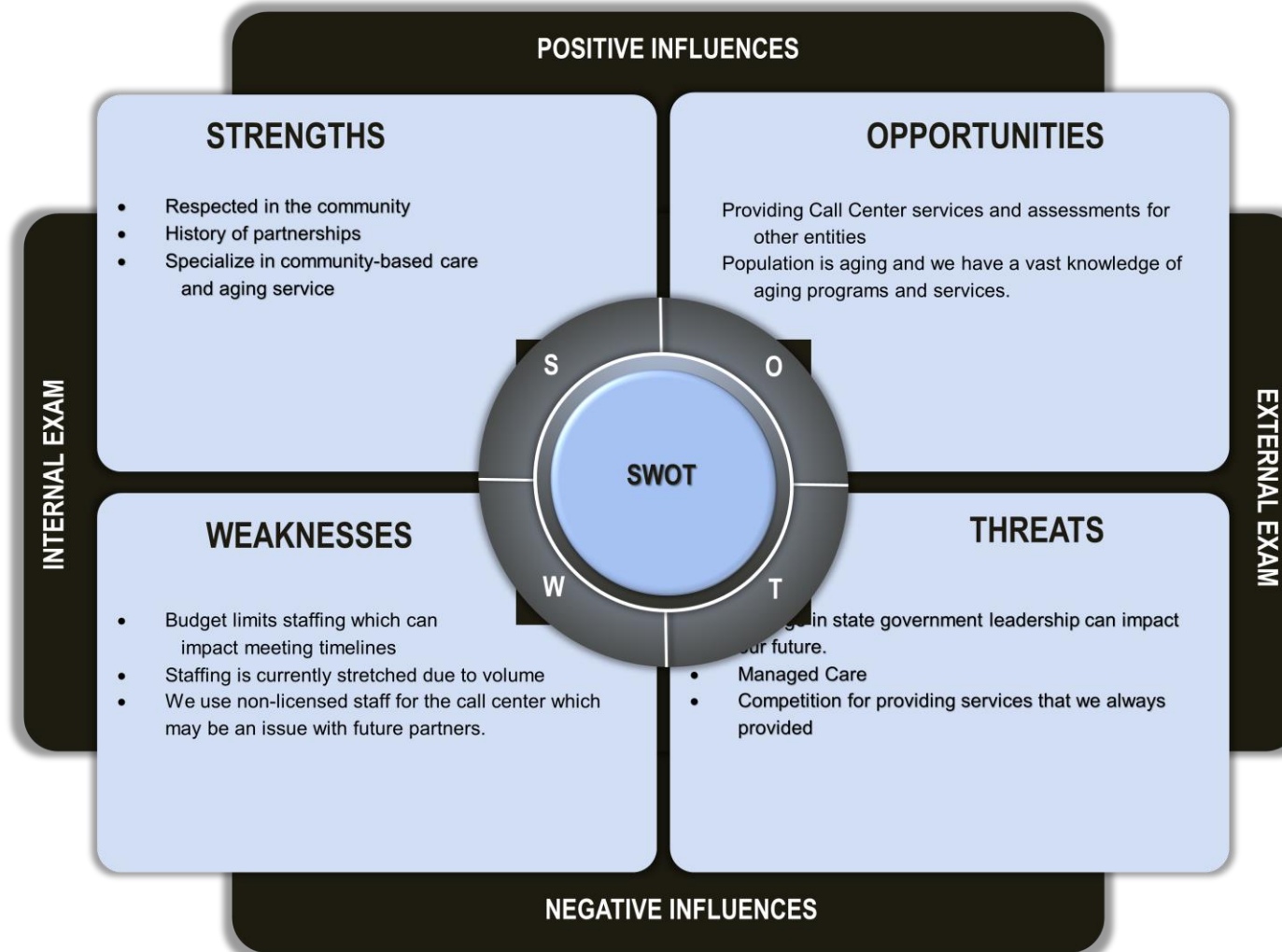


- Take care of your internal and external customers.
- In turn they will take care of you...
- If you fail either customer, the negative impact is great.
  - Loss of Trust
  - Impacts Referrals
  - Community and Business Reputation





# SWOT ANALYSIS



**so what  
exactly are  
we doing  
here?**



## What:

- ADRC Redesign focuses on developing a structural redesign of standard processes with the screening team.

## Why:

- Our screening team was having a difficult time staying on top of our referrals
- Improve our customers experience and satisfaction when calling into the ADRC
- Create a standard efficient process to increase number of completed calls from start to finish.
- Our Case Management team had grown a great deal over the years but not the ADRC team.



## Justification for the project

- Compliance – Capturing every call live
- Development – Increasing capacity and anticipation of future productivity increases
- Improve Satisfaction Survey Results



## The Goals of the project:

- Increase the number of calls handled by each screening team member from 8-10 to 20.
- Establish a standard process and update tools used by the screening team and ADRC
- *Build positive team, individual and leadership culture*



# SOUND FAMILIAR?

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**“This project is extremely important, but it has no budget, no guidelines, no support staff and it’s due tomorrow morning. At last, here’s your chance to really impress everyone!”**



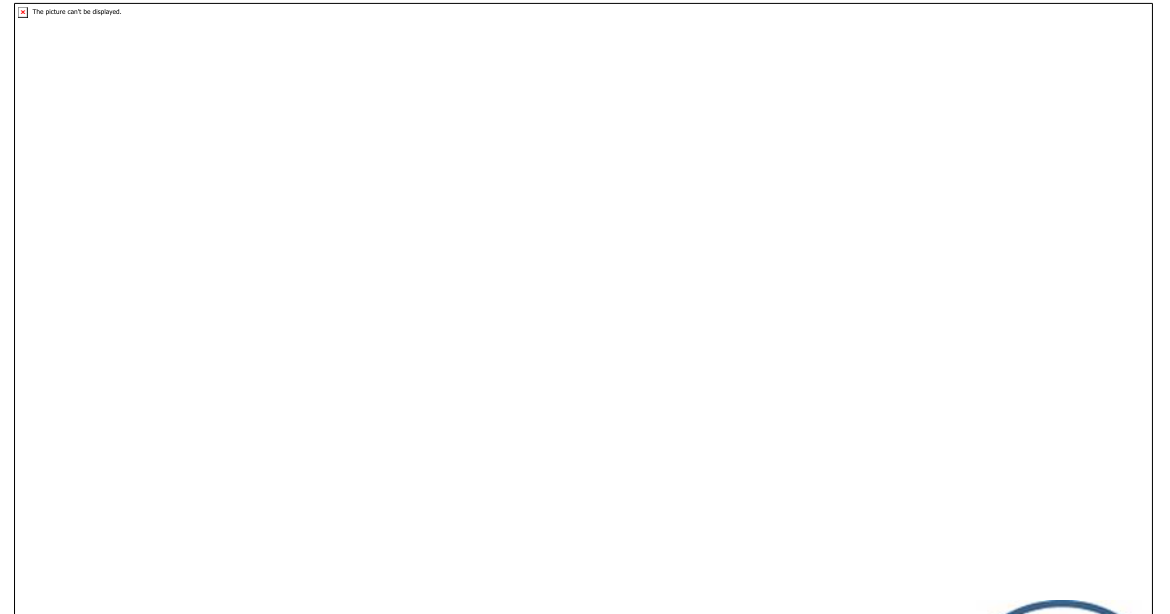
## Essential Lean Six Sigma Tools to use with the DMAIC Approach



**LEAN SIX SIGMA** IS A METHOD THAT PROVIDES ORGANIZATIONS TOOLS TO IMPROVE THE CAPABILITY OF THEIR BUSINESS PROCESSES. THIS INCREASE IN PERFORMANCE AND DECREASE IN PROCESS VARIATION HELPS LEAD TO WASTE REDUCTION AND IMPROVEMENT IN PROFITS, EMPLOYEE MORALE, AND QUALITY OF PRODUCTS OR SERVICES.

# DEFINE

- Define is **the first Phase of the Lean Six Sigma improvement process**. In this Phase the project team drafts a Project Charter, builds a high-level map of the process and begins to explore the needs of the customers of the process.







straight to the point

# what is a Project Charter?

## DEFINE - TOOL

A **project charter** is a living document that houses all critical components of the rationale for the project by clearly defining the presenting problem, calling out the business impact, the scope of the process being reviewed, timeline and team.

### Business Case :

- Establish Standard Call Handling Processes and increase the number of assessment referrals and calls processed daily.
- Decrease call variation and create a standard process for call handling, support navigation, and call completion start to finish. (Capacity Increase)

### Goal Statement/Financial Impact:

- Increase the average number of calls handled daily by each Screener from 10 to 20 completed calls.
- Establish standard processes for call handling, information given, physical set up, and Quality Assurance initiates
- Build positive individual, team, and Department Culture by November 1<sup>st</sup>, 2019.

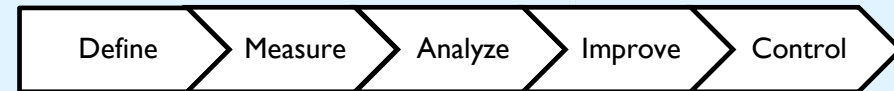
### Problem Statement:

**The ADRC Screening team has no standard processes regarding information communicated to customers and limited resources for customer requested needs. The Call Center has experienced a growing number of incoming calls daily and has not been able to answer all the calls leaving up to 50% of the incoming calls a day unanswered or abandoned. This negatively impacts the customer service to our members, resulted in a low number of calls processed daily by individual screeners and set the metrics out of compliance regarding return calls to consumers in the community.**

### Project Timeline

Start Date: August 1<sup>st</sup>, 2019

End Date: December 5<sup>th</sup>, 2019



### Current Scope:

**ADRC**

**Process Starts – Upon incoming call**

**Process Ends – Caller's needs have been addressed**

### Team Roles

**Project Sponsor-** Abby Morgan, Sr. VP; Matt Reed, Sr. VP

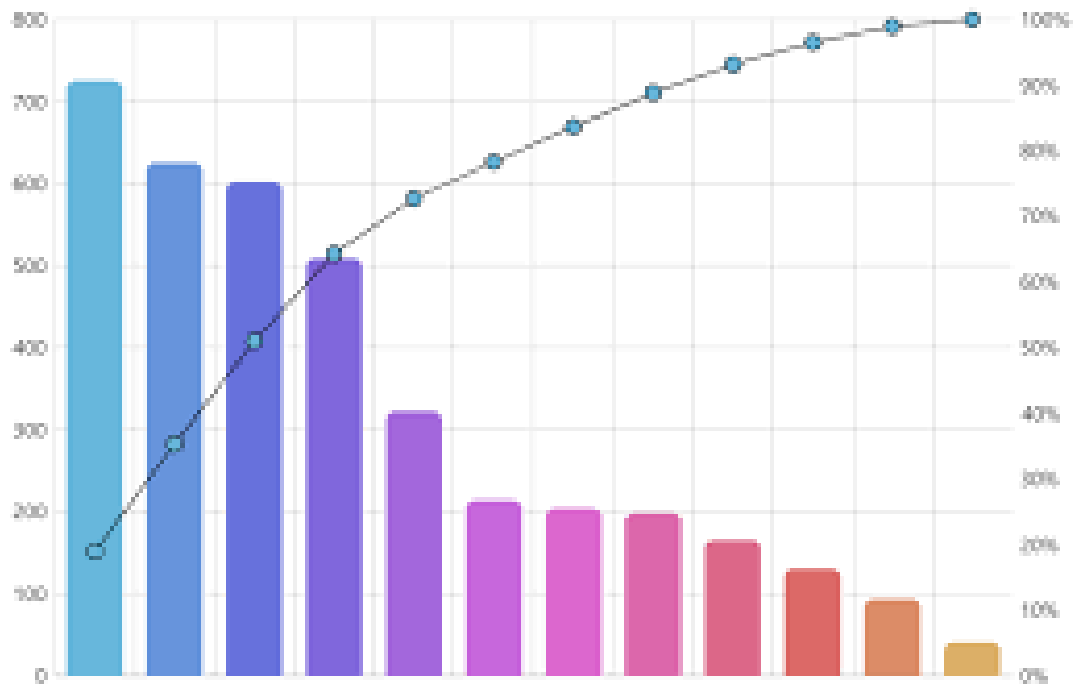
**Project Manager/Team Lead —** Jessica Bader

**Core Team Members —** Connie Ring, Carla Bayonette

**Subject Matter Experts —** Pat Clevidence, Chuck Alderson, Screeners (ad hoc)

10/20/2022

# MEASURE



- The measure phase is all about the baseline of the current process, data collection & validation





**DIRECTION HOME**  
AKRON CANTON AREA AGENCY ON AGING & DISABILITIES

# MEASURE- ADRC TV

## Queued Calls

### ADRC 1

# Queued

0

# ACD Out Que

0

🕒 Cur Max Que

---

# ACD In

4

TSF

100%

### ADRC 2

# Queued

0

# ACD Out Que

0

🕒 Cur Max Que

---

# ACD In

0

TSF

100%

## Agent Status by Agent Name

Agent Name	Agent Status	Connected ID	Release Code	Duration	🕒 Talk	🕒 Release	# NACD Out	# NACD In	# ACD	# Calls
<div></div>	Logged Out			3d 17:19:42	0:00	0:00	0	0	0	0
	Logged Out			16:43:39	0:00	0:00	0	0	0	0
	Idle			1:17:36	9:04	0:00	11	1	0	12
	Idle			8:44	0:50	3:39	1	0	1	2
	Logged Out			16:16:16	0:00	0:00	0	0	0	0
	Release		App Busy	0:44	27:54	0:44	4	0	1	5
	Idle			0:22	5:45	0:00	0	0	1	1
	ACD Inbound External Talk	+13303744902		6:07	11:46	0:00	1	1	1	3
	Logged Out			33d 15:03:12	0:00	0:00	0	0	0	0
	Logged Out			96d 15:23:39	0:00	0:00	0	0	0	0
	Logged Out			4d 14:39:36	0:00	0:00	0	0	0	0
	Logged Out			15:13:34	0:00	0:00	0	0	0	0
	Logged Out			76d 23:58:46	0:00	0:00	0	0	0	0
	Release		Meeting	4d 18:34:07	0:00	9:12:59	0	0	0	0
	Idle			9:47	0:00	0:00	0	0	0	0



# ANALYZE

- The Analyze phase of DMAIC helps project teams identify problems in the production process that cause product defects.





# ANALYZE

- **What does the data show?**
  - We were providing a poor customer experience
  - We had a high call abandonment rate
  - We lacked the ability to grow and take on new business
  - We were impacting the safety and efficiency of other teams



# ANALYZE- ROOT CAUSES

- **Lack of teamwork**
  - Absence of day-to-day leadership in the unit
  - Lack of individual and team goals
  - Lack of constructive feedback
- **Outdated Equipment**
  - Inadequate headsets
  - Inefficient workstation set up
- **Lack of Screener training**
  - Lack of knowledge regarding program eligibility and availability
  - Inconsistencies in information and referrals given
  - Inconsistencies in documentation
  - Lack of knowledge regarding next steps in the process



# IMPROVE



- The Improve Phase is where the team gets to solve the problem. They develop solutions, pilot the process changes, implement their ideas and collect data to confirm they made a measurable difference. This is where the hard work pays off.



# IMPROVE- Process Improvements

## **ROK's – Ring of Knowledge**

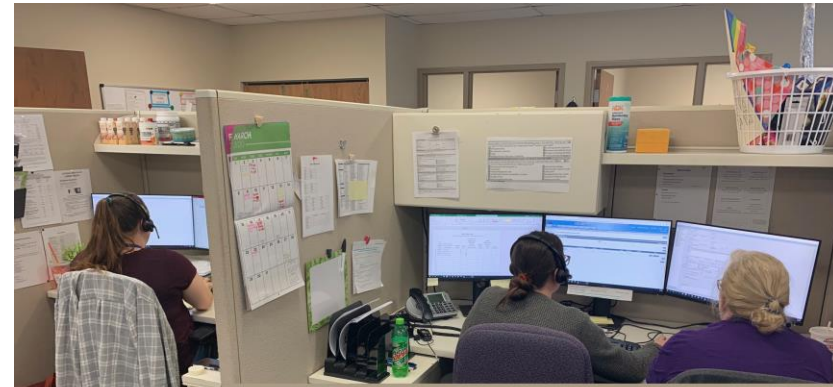
- Use of ring of knowledge cards (ROK cards) to have a uniform greeting
- decision tree in directing calls
- standard follow up for referrals
- closing statement for what will happen next

## **DDE – Direct Data Entry**

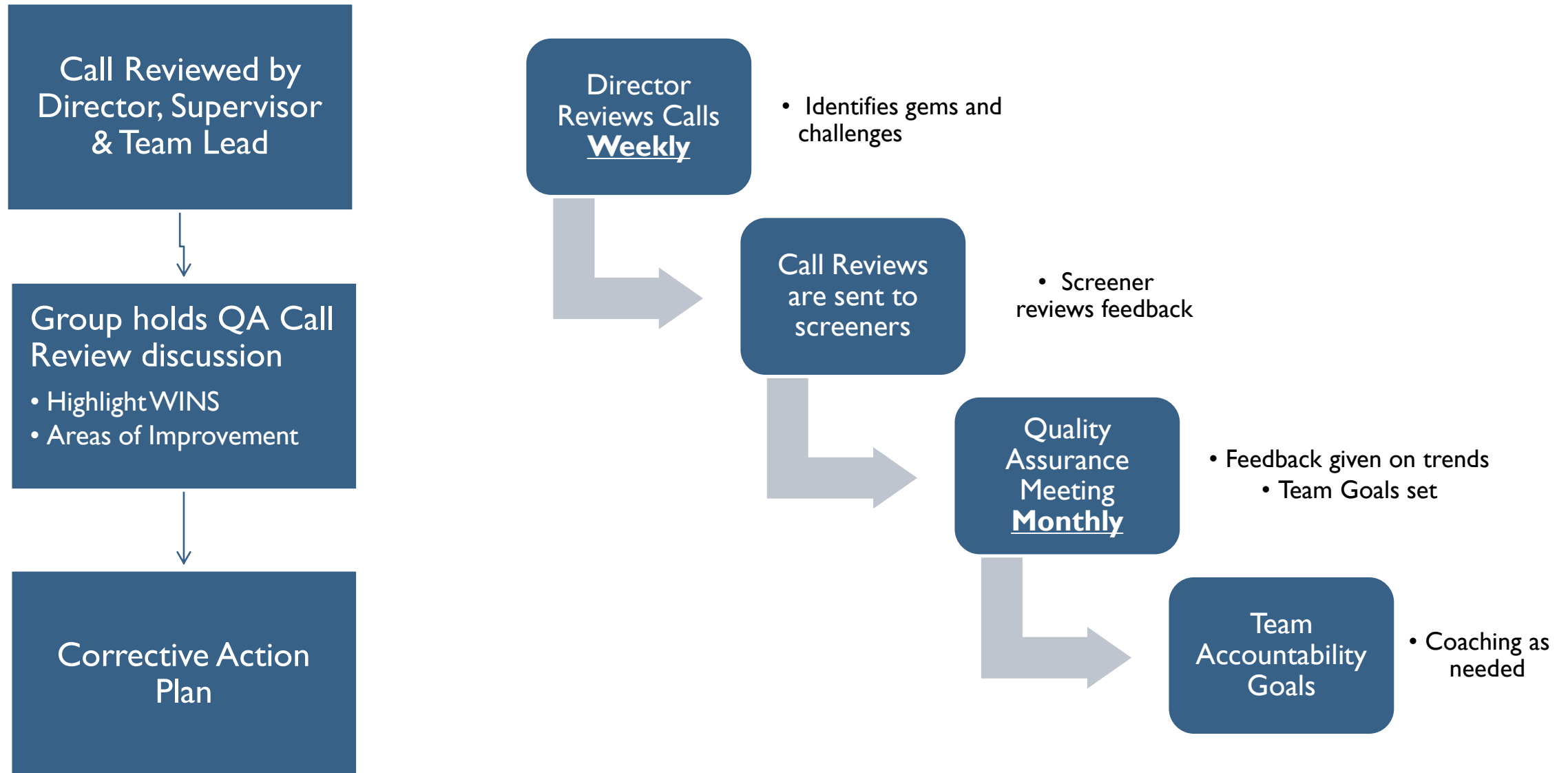
- Use of direct data entry documentation template for required information

## **Quality Assurance Monitoring**

- Revised daily log to log completed calls
- Daily goal of 20 completed calls



## Current State QA Process



# CONTROL

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- The Control phase involves putting systems in place to measure and monitor the new process.





### Quality Assurance Review Process

- Standard process for call reviews
- CQI feedback loop

### ADRC Dashboard

- At-a-glance check of real time status in the call center

### Individual Dashboard

- Number of Completed Calls
- Calls Presented/Accepted
- Satisfaction survey scores

### Operational Dashboard

- Opportunities into ADRC
- Calls answered live
- Call Abandonment Rate
- Calls Transferred to Survey

RECOMMENDATION FOR IMPROVEMENT

# CONTROL PLAN OR CLOSING PLAN

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## Daily

- Individual Dashboard Reviews & Alerts
- Team Leader Activities
- Huddles, Call Assignments, Coaching, Adherence to Best Practices

## Weekly

- ADRC Weekly Supervisors Meeting
- Operational Dashboard Review
- Quality Assurance Call Reviews

## Monthly

- Quality Assurance Team Meetings
- Team Satisfaction Scores
- ADRC Dashboard Trends Review

## Quarterly

- ADRC Operational Dashboard Trends
- AIRS Certification
- Performance Goal Monitoring/Review Compliance Quarterly Reviews

## Annually

- Annual Staff Reviews
- Department Satisfaction Scores
- Performance Goals

# CONTROL PLAN

# WERE WE SUCCESSFUL????

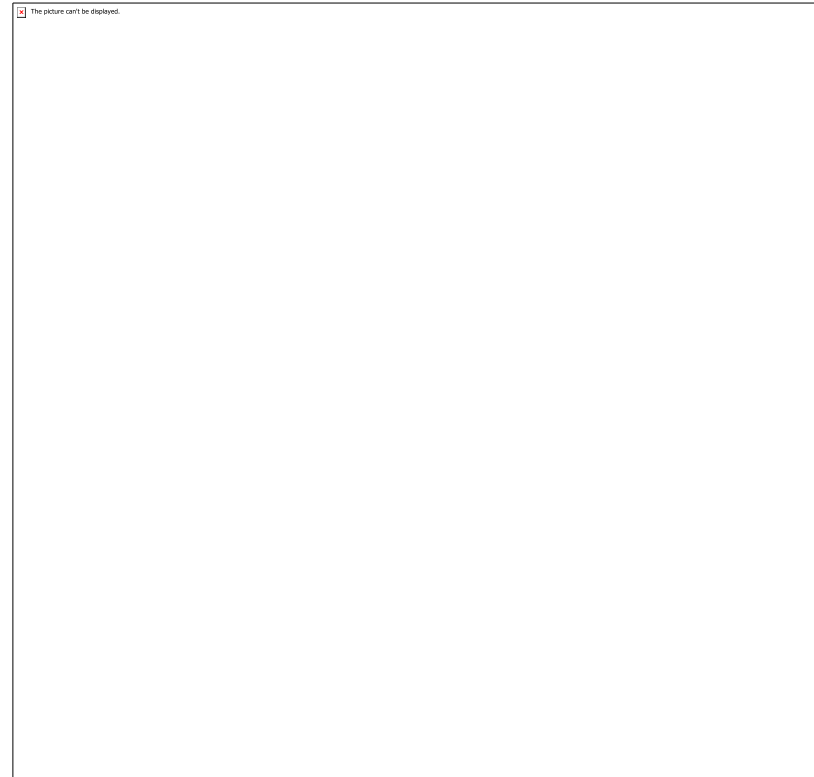
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- INCREASE in total completed calls daily
- INCREASE in the number of standard processes
- INCREASE in employee satisfaction
- INCREASE in customer satisfaction



# LESSONS LEARNED

- **Lessons Learned:**
  - Included employees increases ownership
  - Empowered employees are efficient
  - Consistency breeds results



**Team Breakfast to Celebrate**



# POST-IMPROVEMENT

Pandemic

ROK  
Cards/Standard  
Work

Monthly  
Dashboard  
Review

Closed Loop  
Referral  
System





# THE PANDEMIC



- Offices Closed
- Home-based Systems



# STANDARD WORK

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- Voice vs Choice
- Identification
- Implementation
- Assurance



# DASHBOARD REVIEWS

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# CLOSED LOOP REFERRAL

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# CLOSED LOOP REFERRAL

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## WHAT'S NEXT

Redesigned  
Leadership  
Structure

Staffing Issues

Culture Design-  
Local Performance  
Culture

AIRS Certification

Quality  
Improvement "On  
the Shop Floor"

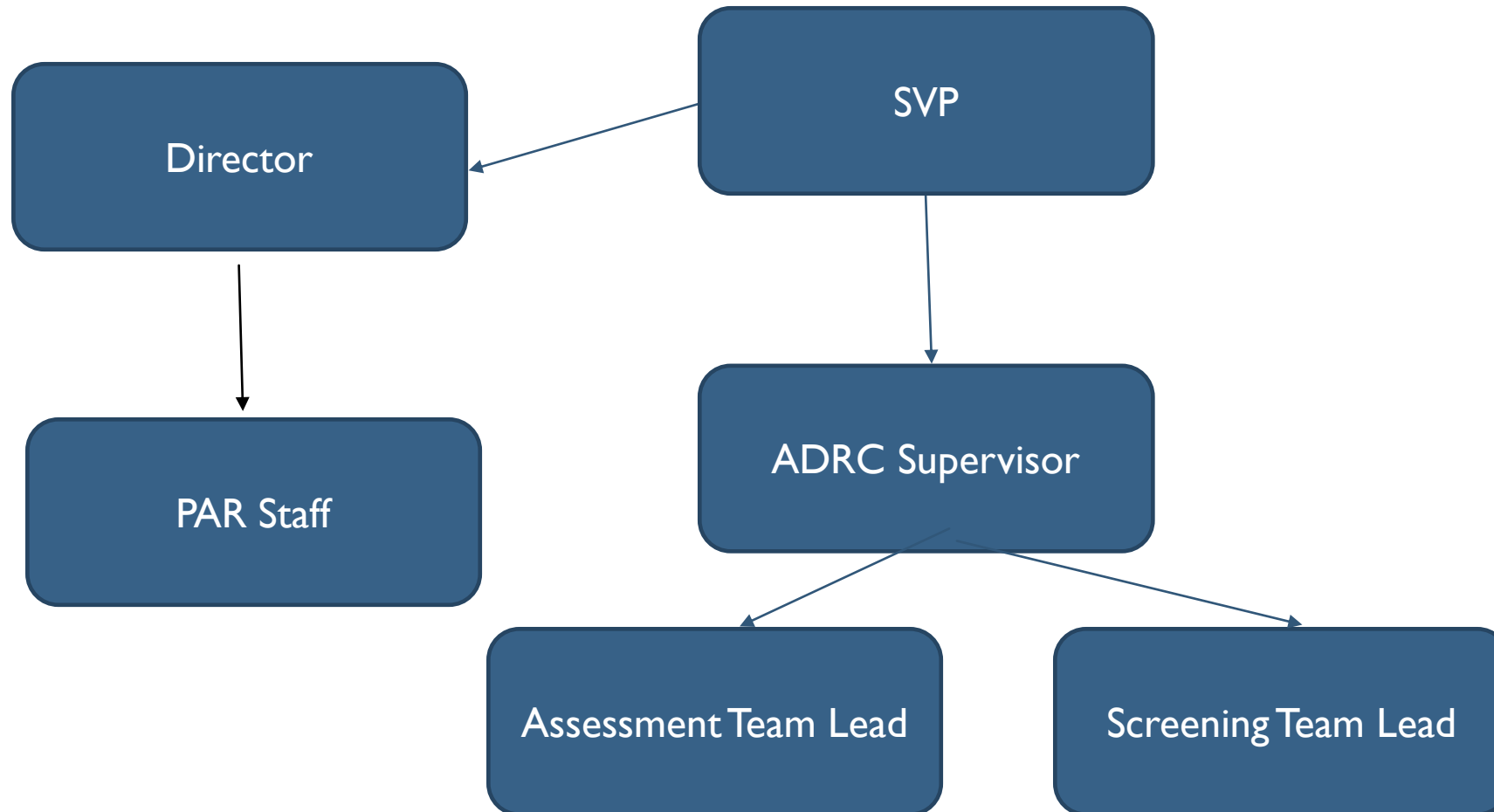


# LEADERSHIP OF ADRC

- Span of Control
- Executive, Director, Supervisor, Team Leaders
- Director- Supervision of PAR and QI
- Supervisor- Screening and Assessment
- Two Team Leaders- Screening and Assessment

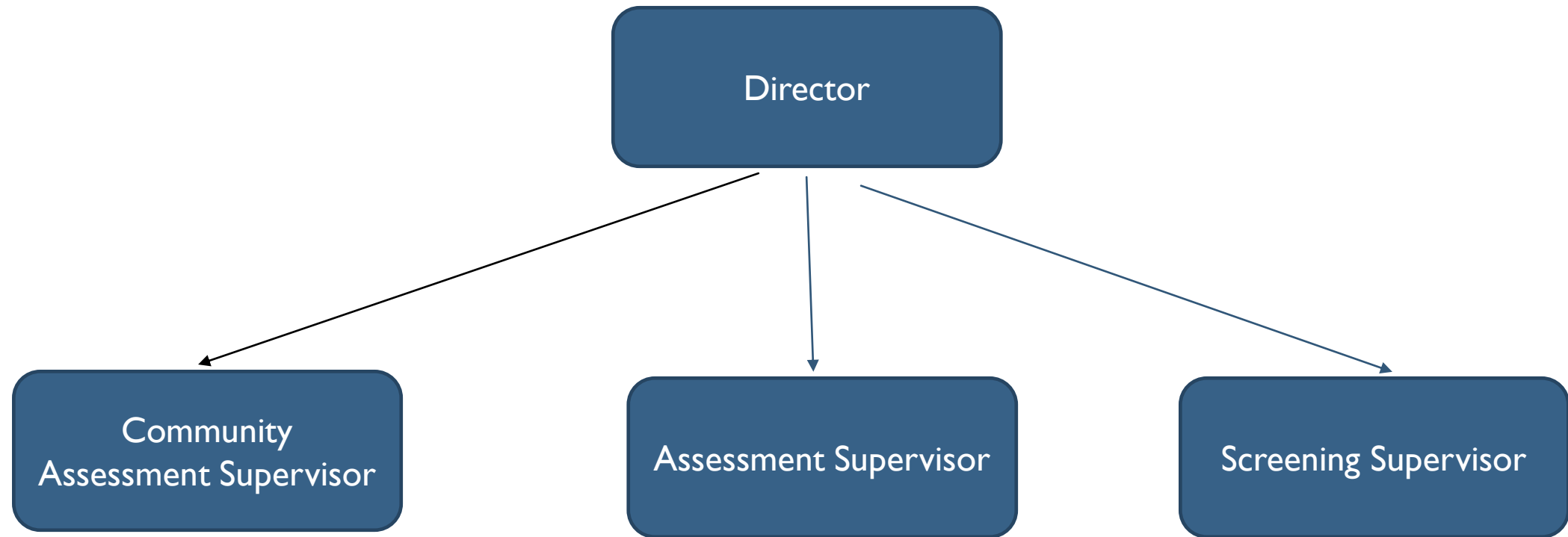


# LEADERSHIP OF ADRC

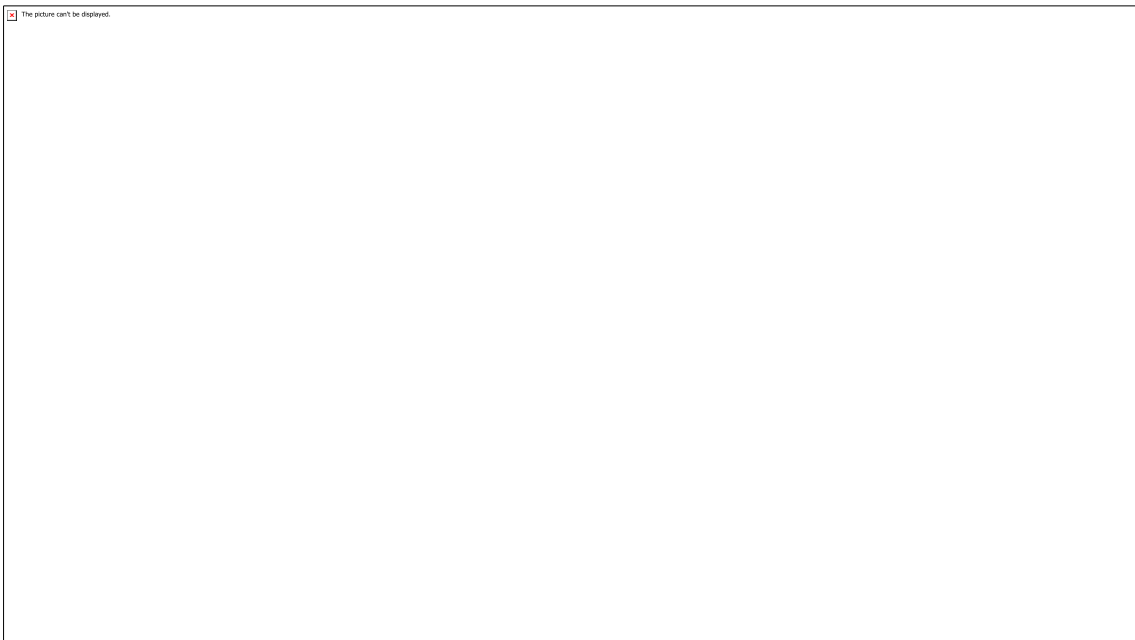




# LEADERSHIP OF ADRC



# STAFFING



- Retention
- Recruitment



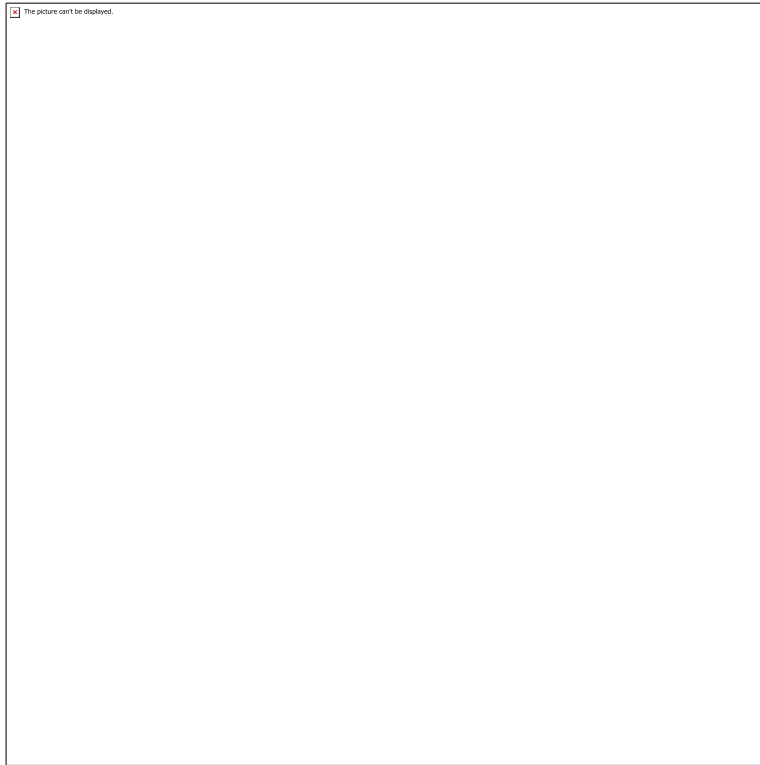
# CULTURE

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## Local Performance Culture



# AIRS CERTIFICATION



- **Certification for Community Resource Specialist - Aging/Disabilities (CRS- A/D)** This is designed for practitioners who work directly with clients and caregivers within the aging and/or disabilities area and perform the same basic range of skills and tasks as a comprehensive I&R Specialist but who also have a special depth of knowledge related to their core client group.



Supervisor Presence

Dashboard  
Improvements

Data into Action

Standard Work  
Assurances

- Training
- Testing
- Monitoring

QUALITY IMPROVEMENT

# QUESTIONS



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