

*Next Steps for Your*  
**Local Integrated Services  
Leadership Team**

*July 29, 30, and 31, 2013*

*Today...*

- ✓ Learn from Local Team Reports and Provide ISD Updates
  - ✓ Discuss the Integrated Customer Flow and ISD Procedures
  - ✓ Enhance the Product Box and Promote Its Services
  - ✓ Design (and Improve) the Delivery of Employer Services
- ✓ Exchange Ideas and Plan Next Steps for the January 1 Countdown

***Agenda:***

**1. Local Leadership Teams on the Move!**

- Local Area Progress Reports
- Benchmarking and Peer Promising Practices

**2. Customer Flow and ISD Procedures**

- Update: Co-Enrollment and WIA Performance
- Update: Data Entry, Eligibility, and Documentation
- Mapping the Flow
- Developing the Procedures Manual
- First Visit Welcome and Return Visit Procedures
- The “Welcome” Outline
- Your Next Steps: Procedures Manual

**3. Product Box Enhancement**

- Product Box Service Levels and Access
- Promoting and Improving Workshops
- Your Next Steps: Product Box

**4. Business, Employer, and Employment Services**

- Distinction and Connection: Who Does What?
- ISD Priorities for Employer Services
- Cross-Center/Regional Employer Services
- Job Matching and Referral: Who, How, What
- Your Next Steps: Employer Services

**5. January 1 Countdown**

- Leadership Team Action Planning
- Your Timeline
- Immediate Next Steps
- Continued Communication

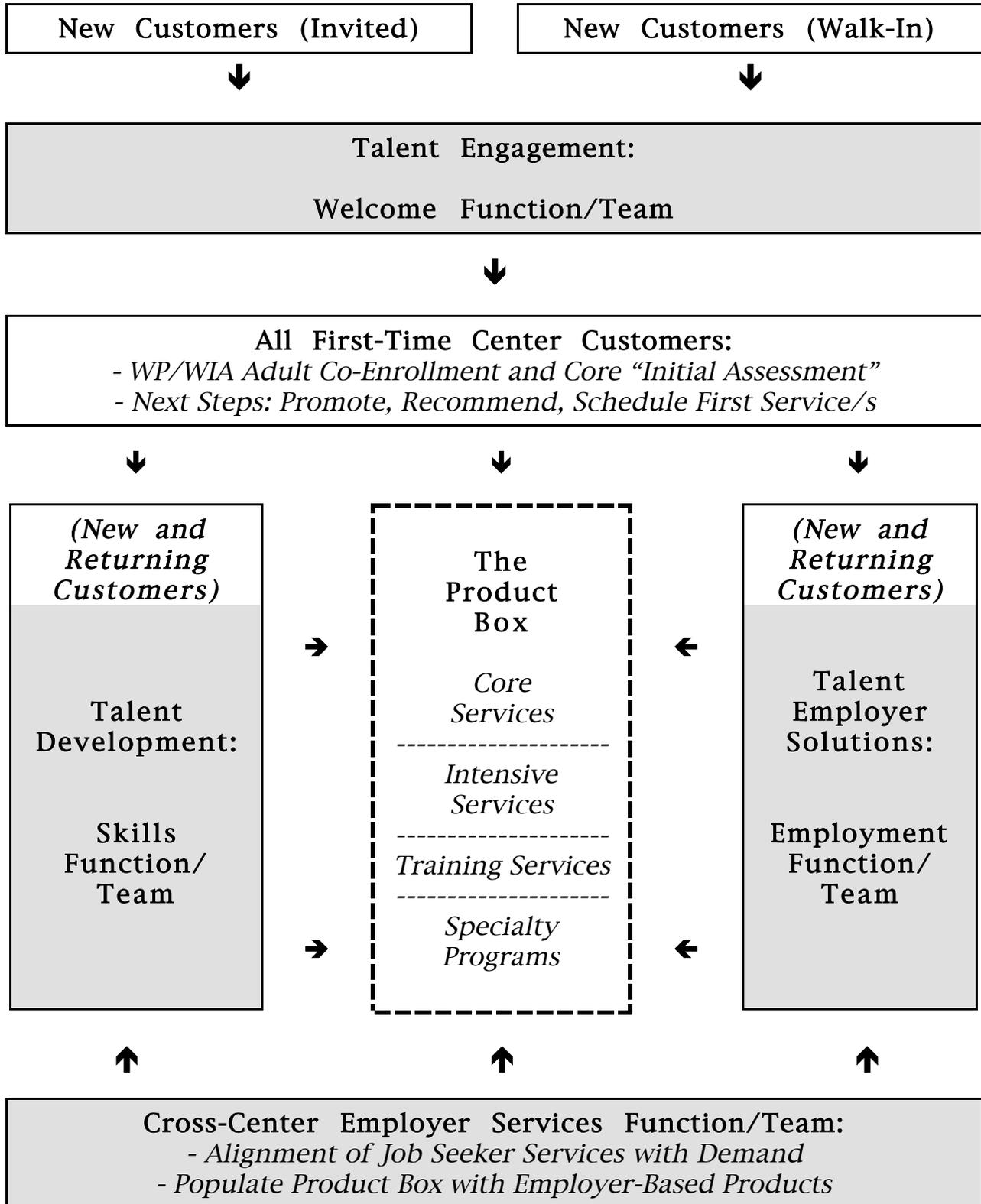
**Local ISD Leadership Teams  
On the Move!**

## Customer Flow and ISD Procedures

- Update:  
Co-Enrollment and WIA Performance
  
- Update:  
Data Entry, Eligibility, Documentation

- ✓ *Mapping the Flow*
- ✓ *Developing the Procedures Manual*
- ✓ *First Visit Welcome and Return Visit/s*
- ✓ *The “Welcome” Outline*

# Integrated Service Delivery Customer Flow



***Make It Real! Get in the Weeds!***  
**Produce an Integrated  
Customer Flow Procedures Manual**

***Contents...***

- Center customer flow chart
- Functions and function purpose
- Connectivity of functions
- A flow chart for each function
- Procedures for each process step
- Relevant policies for each step
- Data entry and “eligibility” by step
- Bulleted staff expectations by step

***Involve Frontline Staff in Developing  
Procedures Within the Framework***

## ***Policy: Integrated Customer Pool***

### **All service locations will:**

- ✓ Provide a one-on-one, staff-assisted welcome meeting to all first-time center customers
- ✓ Enroll all center customers in both the Wagner-Peyser and the WIA Title I Adult Program (and WIA performance) at the time of the welcome meeting
- ✓ Enroll all UI Claimants, whenever eligibility permits, as Dislocated Workers

## ***Procedures: Integrated Customer Flow***

### **Three major components:**

1. Initial customer welcome with immediate access to employment and skill advancement services in the product box

2. Connection of the customer to additional staff-assisted skills and employment services when needed and wanted
3. Continued access to services until the customer's employment goal is achieved

1. Initial customer welcome with immediate access to employment and skill advancement services in the Product Box

All first-time center customers will have a one-on-one "getting started" welcome meeting of approximately 20 to 30 minutes

This meeting will include (at a minimum) the following elements:

- A. Give a sincere and warm, "Thank you for coming"

- B. Ask, “What brought you to the center today?” and conduct a brief and initial assessment of the customer's work experience, skills, and needs
  
- C. Register the customer in the system, including co-enrollment in the WP and WIA Adult Program (and WIA Dislocated Worker, whenever eligibility permits)
  
- D. Complete the initial service plan:
  - 1. Customize and promote a recommendation for initial service/s (based upon the customer's initial assessment)
  
  - 2. Offer additional one-on-one, staff-assisted skills and/or employment service/s during this first visit or at a return center visit

3. Schedule the first service/s and anchor customer commitment to service use

2. Connection of customers to additional staff-assisted employment, skills, and training services when needed and wanted

After completing the welcome process, customers may be scheduled either for a same-day or return meeting with center staff for one-on-one skills and employment consultation and services:

- A. One-on-one skills and employment meetings will result in recommendations for and scheduling of additional services from the product box
- B. All center staff will be trained to assist and facilitate customer access to any product box service by ensuring eligibility for any recommended and needed services

C. When appropriate, staff may schedule customers for additional return one-on-one meeting/s as needed and wanted by the customer

3. Continued access to services until the customer's employment goal is achieved

All staff will promote and schedule additional services from the product box for every customer at every center visit until the customer's employment goal is met:

- A. All services have entered employment as the desired outcome
- B. Skill advancement, occupational training, and employment services are to be offered concurrently whenever possible





## ***Six Product Box Questions...***

- 1. Who is Responsible for the Product Box?**
- 2. What Services Are Currently in Your Product Box and What Needs to Be Created or Enhanced?**
- 3. How Will the Services in the Product Box Be Resourced and Delivered?**
- 4. How Will Customers Be Connected to Product Box Services?**
- 5. How Will You Promote Your Product Box Services?**
- 6. How will You Continuously Improve the Quality of the Product Box Services, Including Your Workshops?**

*Customer Needs/Wants and  
Priorities for Improvement*



**Five Product Lines in Product Box**

- ① Job Getting and  
Job Readiness Services**
- ② Skill Development and  
Improvement Services**
- ③ Occupational Training Services**
- ④ Employer-Sponsored Services**
- ⑤ Specialty Program Services**



*Economic Conditions and  
Labor Market Realities*

*How Will You Promote and  
Market Product Box Services  
So More Customers Will Take  
Advantage of Your Services?*

**Promotion Improvement**

- ✓ “Point-of-Purchase” Promotions
- ✓ Merchandizing Adjacencies
- ✓ Motivational Promotional Materials
- ✓ Name to Entice and  
Increase Perceived Value
- ✓ Staff Can’t “Sell”  
What They Don’t Know
- ✓ Every Workshop Leads to  
Next Service

## Promoting Workshops

### *Good Workshops Names...*

- ✓ Focus on the customer,  
not the “program”
- ✓ Give solutions to  
customer-defined problems
- ✓ Talk like your customers’ talk

### **Name by Gain (Not by Pain)**

- *Finding the Job You Want*  
(Not Job Search Skills)
- *Interviews to Land the Job You Want*  
(Not Interview Tips)
- *Excel for Excellent Jobs* (Not Excel 101)
- *Finding Money to Pay for School*  
(Not WIA Orientation)

**Promote the Benefits (Not Features)**

*How Will You Continuously Improve the Quality of the Product Box Services, Including Workshops?*

**Product Improvement**

- ✓ Bundle/Unbundle
- ✓ Variety and Frequency
- ✓ Quality Content
- ✓ Quality Presenters
- ✓ Continuously Pilot, Replenish

*Presenters who...*

- Want to do it
- Do it frequently enough to become good at it
- Look like they're having fun and know content
- Respond to and customize for attendees

## Improving Your Workshop Materials

- ✓ Organized and Sequenced
- ✓ Packaged and Attractive
- ✓ Interactive and Personalized
- ✓ Checklists, Tips, Templates
- ✓ Customized to Attendees
  - ✓ Relevant Examples
- ✓ Large Print and Scannable
- ✓ Appropriate Reading Levels

***Always, Have Tangible Take-Aways:  
Increase Perceived Value and  
Reinforce Learning***

## Seek Continuous Engagement and Satisfaction

### *At the end of every workshop...*

- Plan immediate, next steps
- Assign homework
- Publicize center resources
- Give tangibles  
(with center name)
- Cheer progress and  
celebrate learning
- Offer, promote, and  
schedule next service
- Seek satisfaction and feedback



## *Strategy for Employer Services*

1. What are business, employer, and employment services and how are they both distinct and connected?
2. Who is responsible for delivering employer services?
3. What are the key responsibilities?
4. How will you distinguish, connect, and enhance the virtual and staff-assisted labor exchange systems?
5. What are the “dual-customer” employer services that directly support employment of job-seeking customers?
6. What are the continuous improvement opportunities for each of the six key dual-customer products?
7. How will you improve the referral process to increase the number of referrals that convert to hire?

## **Business Services:**

**Offering and providing comprehensive, integrated, system-wide, human resource services, including workforce planning, sector support, and talent pipeline improvement for economic development through consultation, recruitment, retention, and training**

- ✓ **Emphasizes Private-Sector**
- ✓ **Links to Economic Development**
- ✓ **Operates within Economic Regions**
- ✓ **Supports Sectors and Industries**
- ✓ **Creates Workforce Intelligence to Map Talent Pipeline**
- ✓ **Informs Workforce System of Demand for Alignment**

## Business Services:

- ✓ Regional System Team:  
Workforce Board Convened
- ✓ Team: Workforce, Economic Development, and Education
- ✓ Workforce Intelligence: To and From
- ✓ Workforce System: Regional Workforce Planning
- ✓ Workforce Planning: Sector Solutions
- ✓ Solutions: Improve Workforce to Enhance Pipeline

## ⚡ Workforce Board Role:

- Link to Economic Development
- Engage Private Sector

*(Not a “Service”: Strategic Support)*

## **Employer Services:**

One important component of business services that offers and provides recruitment and placement services to individual employers

- ✓ **Contributes to Business Services**
- ✓ **Targets All Employers  
(Not Just Private-Sector)**
- ✓ **Operates within Labor Market Areas**
- ✓ **Retails Services to Individual,  
Hiring Employers**
- ✓ **Provides Labor Exchange Virtually  
and Staff-Assisted**
- ✓ **Supports Centers through  
Employer Engagement**

## Employer Services:

- ✓ Team: Labor Market Area
- ✓ Labor Market: Spans All Centers and All Programs
- ✓ Team: Staff Directly Involved in Services to Employers
- ✓ Provides: Recruit/Placement Services
- ✓ Focus: Improved Labor Exchange
- ✓ Supports: Centers in Connecting Talent to Employers

## ⚡ Employer Services Team Role (Across Centers):

- Employers do not recruit by center, zip, or alpha
- Narrow and specify performance and time priorities

## **Employment Services:**

Transforming job seekers into better job candidates and connecting them to the labor market through skill enhancement, skill verification, and quality referral

- ✓ **Contributes to Business Services through Workforce Improvement**
- ✓ **Contributes to Employer Services through Better Job Candidates**
- ✓ **Aligns Job Seeker Preparation Services with Demand**
- ✓ **Connects Center Talent to Job Openings**
- ✓ **Improves Job Referrals through Responsive Skill Improvement and Skill Verification**

## Employment Services:

- ✓ Delivery: Center-Based and Virtual System/s
- ✓ Align: Job Seeker Preparation Responsive to Employer-Demands
- ✓ Focus: Entered Employment Through Job Search Support and Qualified Referral
- ✓ Connects: Provides Quality Referrals to Job Openings

## ⚡ Workforce Center Role:

- Difficult to combine employer and employment services into a single staff position
- Dedicated customer group is best

# Integrated Service Delivery System

Product Box Offerings	Employment Service	Employer Service	Business Service
Assessments (Job Seeker)	X	X	
Background Checks/Drug Tests		X	
Basic Skills Training	X		
Career Coaching	X		
Career Readiness Certification/Work Keys	X	X	X
Cash Register Training	X	X	
CDL Training	X	X	
Computer Training	X	X	
Customer Service Training	X		
Customized Employer Training		X	X
Employer Profiles	X		
Financial Literacy Training	X	X	
HSD/GED	X		
Human Resource Consulting		X	X
Incumbent Worker Training			X
Interactive Job Matching	X	X	
Interactive Job Postings & Recruiting		X	
Internships	X	X	
Job Club/Networking	X		
Job Fairs	X	X	
Job Profiling			X
Job Ready Workshops/Testing	X	X	
Job Recruiting Portal			X
Job Seeking Skills Workshops	X		
Labor Market Information	X	X	X
On the Job Training	X	X	X
On-Site Job Interviewing		X	X
Partner/Agency Referrals	X	X	X
Power Resume Service	X	X	
Pre-Hire/Post Hire Testing	X	X	
Rapid Response Services		X	X
Resume Development	X		
Seminars		X	X
Soft Skills Certification	X	X	
Tax Credits & Incentives for Employers		X	X
Veterans Services	X	X	
Vocational Services	X	X	
Webinars/Videos for Employers		X	
Webinars/Videos for Job Seekers	X		
Work Experience	X		
Youth Services	X		



***Priorities:***  
***Employer Services Team***

**The Six Key Dual-Customer,  
Connection Services**

- ①** Seek Job Postings Reflecting Center Talent Inventory
- ②** Promote Qualified Center Candidates and Talent Pool
- ③** Arrange Hiring Events for Pre-Screened Center Talent
- ④** Conduct Employer Testing as a Pre-Referral Service
- ⑤** Offer Subsidies to Encourage Hiring of Center Talent
- ⑥** Develop OJT Opportunities

How will you improve the referral process to increase the number of referrals that convert to hire?

**“Back to Basics” for Labor Exchange!**

Enhance self-service and staff-assisted job seeker registrations and employer postings to improve referral quality

*Continuous Improvement...*

- ✓ Increase Quantity/Quality of Job Seeker Registrations
- ✓ Define and Monitor “Quality” Registrations
- ✓ Enhance the Quality of Employers’ Job Posting Detail
- ✓ Standardize Protocols for Post-Listing Follow-Through
- ✓ Improve Referral Process to Improve Referral-to-Hire Ratio

## Staff-Assisted Job Postings:

### Defining the Operational “Who” and “Follow-Up”

- ? Enters and Ensures Quality ?*
- ? Matches Outward from Job Order ?*
- ? Monitors Referral Quality, Activity ?*
- ? Modifies, When Needed ?*
- ? Monitors Close Pending for Service ?*
- ? Assesses Satisfaction, Retains, ?*

**⚡ Employer Services Team  
Protocols! ⚡**

**⚡ What Can Be Centralized? ⚡**

**? What Are Your Definitions ?**

**? Self-Service and Staff-Assisted ?**

**? Suppressed and Unsuppressed ?**

**? Exclusive and Nonexclusive ?**

**? Pre-Screen and Screen ?**

**? “All Staff Refer” and “Gateway” ?**

*What do employers  
expect when they post?*

*What is the  
service promise made?*

<b>What Are You Promising the Employer?</b>	
<i>Service Method</i>	<i>The Promise</i>
<b>Self-Entry:</b> Virtual System	Exposure, Self-Recruit
<b>Staff-Assisted:</b> Incoming/Outgoing	Depends on Level
<b>Unsuppressed:</b> Open to All	Publicize, Increase Pool
<b>Suppressed:</b> All Staff May Refer	(Pre-)Screen, Refer
<b>Limited:</b> Certain Staff Refer	Screen, Refer, Place
<b>Exclusive:</b> Only Post Here	Screen, Refer, Place



*Summary and Next Steps...*