

The Human Services Agency of San Francisco Improves Scheduling and Transparency with Monet Software



The Human Services Agency (HSA) of San Francisco staffed with 585 agents selected Monet cloud-based WFM Live to improve forecasting and scheduling. The implementation of Monet Live, Workforce Optimization in the cloud has brought the HSA more visibility, accuracy and transparency on the agents' schedules.

The HSA can build schedules over several months, the accounting of Human Services Agency resources is more accurate and more up to date, and they can determine the number of hours our programs spent in training, or meetings, overtime, calling out sick. This is very useful in calculating shrinkage, planning, forecasting and scheduling to respond to the needs of their customer base.

"In this type of environment there are so many different things that might be happening in a given day. The value of Monet WFM for us is the transparency it provides – everyone knows what everyone is doing"

- Taninha Ferreira, SF Benefits Net
 Operations Manager

The opportunity and challenge

- Improve forecasting and scheduling
- Increase visibility on the agents schedules
- Move away from spreadsheets
- Reporting needs

Solution benefits

- Reduced IT-investment and admin resources
- Low implementation service fees
- Affordable per user license model
- Available reporting tools
- Robust yet easy to use interface

Background

The Human Services Agency (HSA) of San Francisco, California is comprised of a number of critical programs that the city's residents rely on every day. These include Medi-Cal, which offers free or low-cost health coverage to more than 170,000 people, CalFresh, which helps to improve the health and well-being of qualified households and individuals by providing them a means to meet their nutritional needs, and CalWORKS, which provides financial aid and services to 3,900 families.

The Opportunity and Challenge

For the three programs mentioned above more than 470 supervisors, administrators and line staff are employed. Taninha Ferreira, who oversees systems and data operations, had started her career as a contact center analyst, so she recognized the value that a forecasting tool could provide, and began the search for one that would meet their needs.

While that search progressed, The CalFresh and Medi-Cal programs were integrated, which created additional scheduling challenges. Thus, an effective scheduling tool became a priority as well. The spreadsheets they were using up to that point were not sufficient for call center groups. Even worse, 75% of CalFresh and Medi-Cal employees (who did not work the phones) were monitored with separate spreadsheets, which was quite inefficient. There was a way to determine how groups and agents could be moved to assure sufficient coverage, but the process was very manual, disorganized, tedious and time-consuming.

"It caused a lot of problems," Ferreira recalls. "We had to do a lot of last-minute running around and were constantly making changes on the fly."

The challenge became finding a solution that would improve the quality and efficiency of forecasting and scheduling, while also supporting the unique organizational structure of HSA. "We have often faced situations where we purchased tools designed for private sector operations, and these tended to be a lot simpler," Ferreira explained. "Our systems are very complex and require a lot more customization, so I was looking for a solution where that would not be an issue."

Solution Selection

The search for a better technology solution began in 2013 and took several months, a result of the procedures that government agencies must follow in product acquisition. Participating vendors were asked a series of questions about how their applications would meet the company's needs, and several companies provided demos.

Once the process was complete, San Francisco's Human Services Agency chose WFM Live, cloud-based workforce management from Monet Software. Among the benefits cited as reasons for the selection was WFM's customization and reporting capabilities, which allow supervisors to review individual and group schedules and review critical reports

"I wanted something where the reports were user-friendly, easy to generate and gave me the information I needed," Ferreira said.

Results

Following the selection of Monet WFM Live, Ferreira says HSA has experienced “total improvement.” Schedules are now built out for months, so employees (and their supervisors) always know when they have meetings, when they should be in training, and what they should be doing each day.

When employees take vacation or sick days, as frequently happens, Monet WFM makes it easy for HSA to immediately and automatically shift schedules to close the coverage gap(s).

“In this type of environment there are so many different things that might be happening in a given day. The value of Monet WFM for us is the transparency it provides – everyone knows what everyone is doing,” Ferreira said.

Return on Investment

With Monet WFM, accounting of Human Services Agency resources is more accurate and more up to date. “At the end of the month I can determine the number of hours our programs spent in training, or meetings, overtime, calling out sick, etc.” Ferreira said. “This is very useful in calculating shrinkage, planning, forecasting and scheduling to respond to the needs of our customer base.”

“I think we use the Monet Extensions tool more than any other customer – we really rely on customizing schedules.”

- Taninha Ferreira, Systems and Data Operations
San Francisco Human Services Agency

About Monet WFO Live

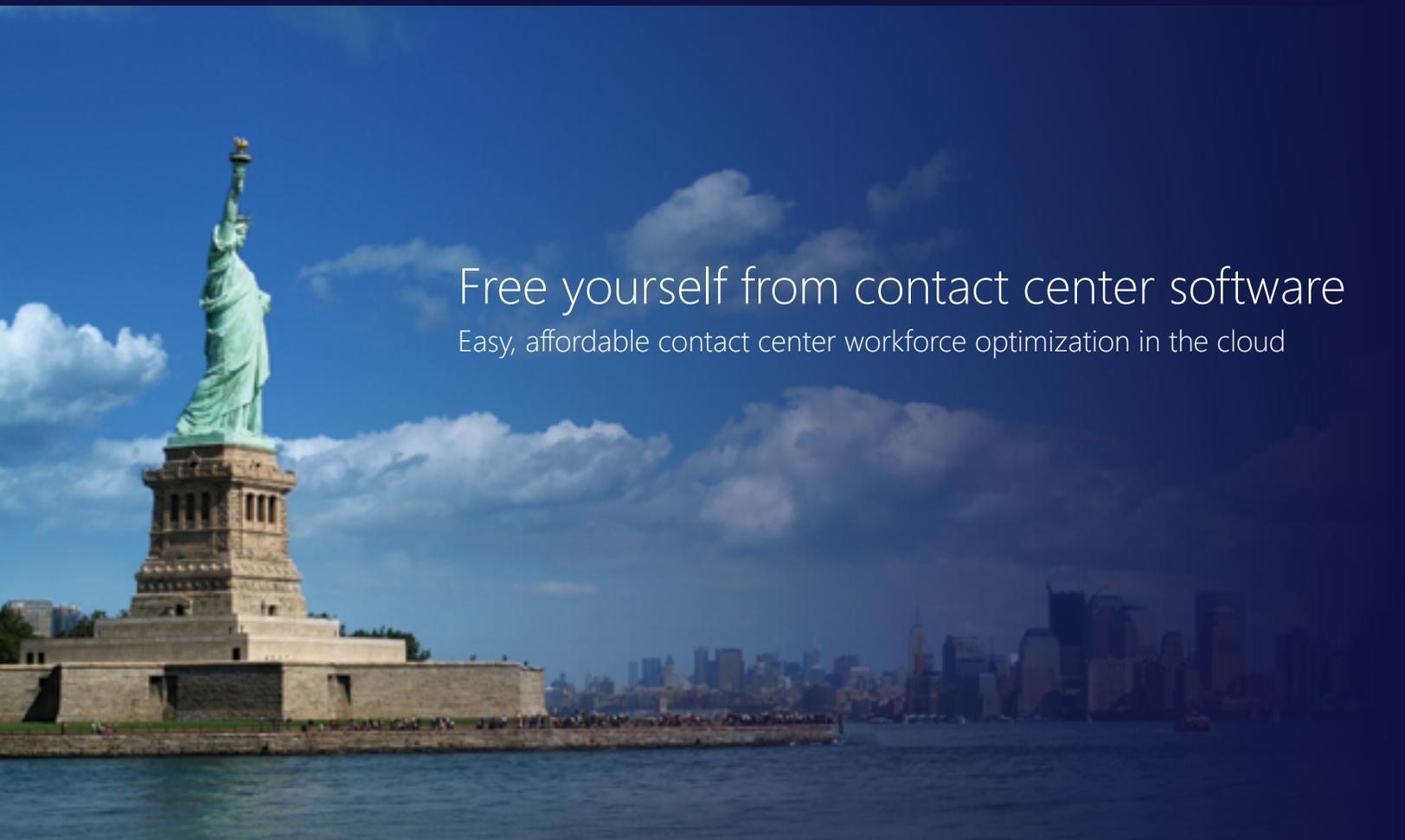
Monet Software is a global provider of workforce optimization software solutions for contact centers. Monet's cloud-based solution, Monet WFO Live, is an affordable and easy to use call center optimization software solution that includes workforce management, call recording, quality monitoring and performance management. Contact centers will start improving service levels and reducing center costs without the upfront expenses and IT requirements of traditional workforce software. For more information about Monet Software, please go to www.monetsoftware.com or subscribe to our blogs about Workforce Management and Call Recording.

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