

Putting People First: Chat Services to Improve Client Feedback Loops

June 15, 2022



**NATIONAL HEALTH &
HUMAN SERVICES**
2022 SUMMIT



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How can chat services in digital benefits applications help you serve clients?



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Learning Objectives

- How chat services support client success
- How chat services create actionable feedback loops
- How you can prepare to implement chat services in your agency

Context on our work

Setting the scene

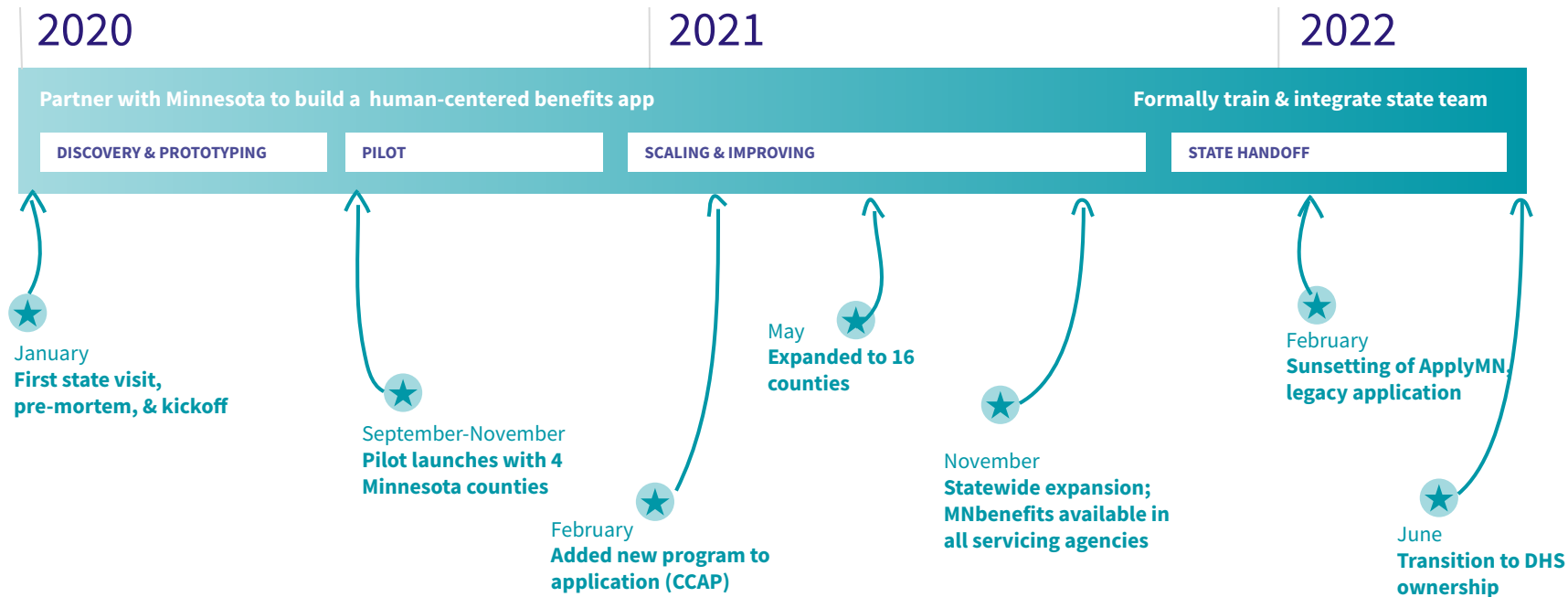
Minnesota is a state-run, **county-administered state**.

Minnesota **DHS serves millions of people** every year with critical food, cash, health, housing, and other assistance programs.

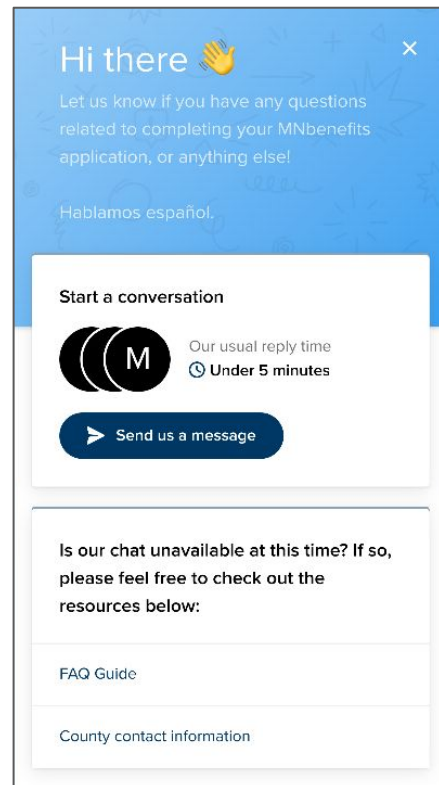
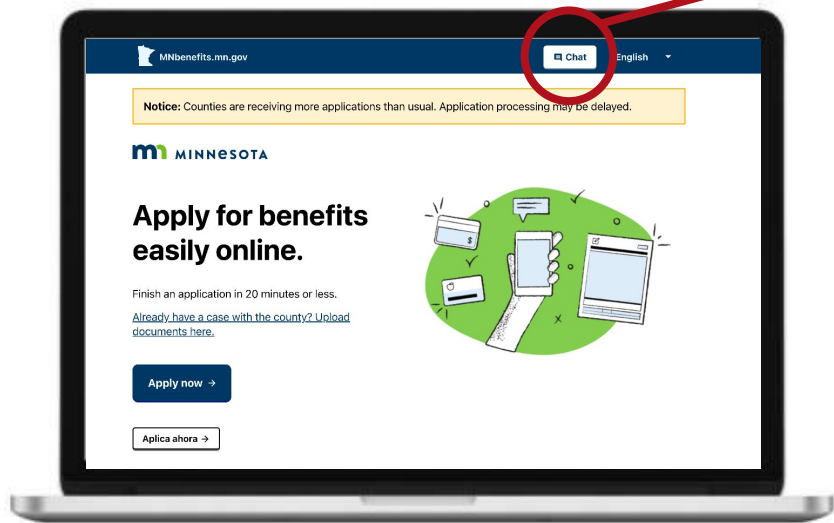
Hennepin County is the largest county in Minnesota, and serves about **25-30% of the entire state caseload**.

About 550 Human Service Representatives (HSRs) in Hennepin County serve 350,000 people per year.

DHS, Hennepin, and Code for America partnered to launch MNbenefits, a new digital benefits application for food, cash, & other assistance

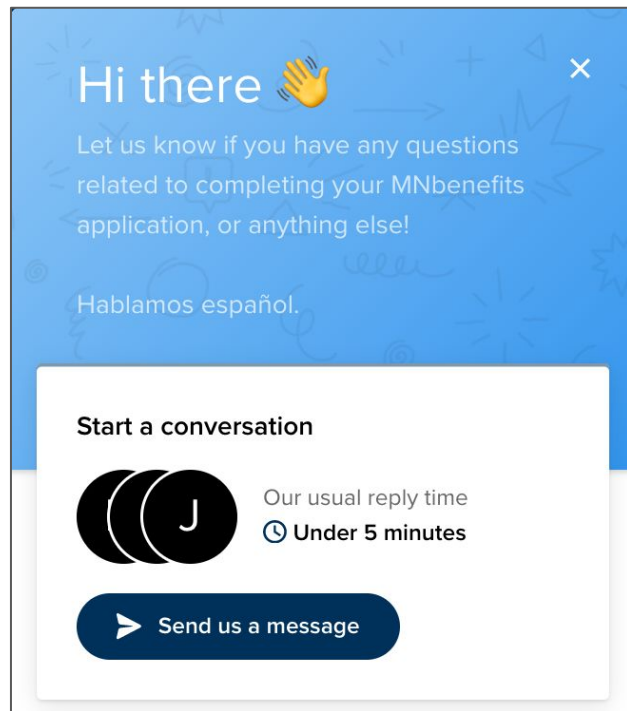


We're going to focus on one underused option today: **chat services**



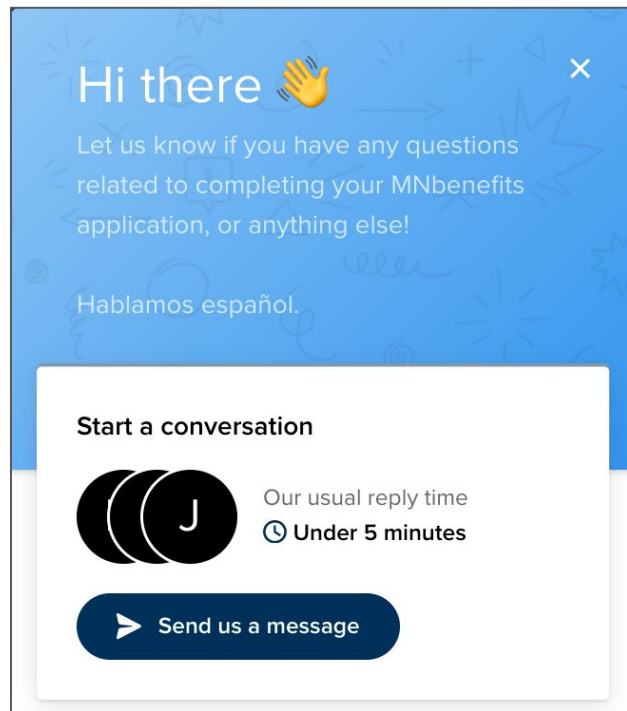
What's unique about embedded chat?

1. **Asynchronous:** Clients and staff reply as available instead of in real-time
2. **Meeting expectations:** Increasingly common way of interacting with businesses
3. **Scaling:** Small teams support many clients at once (about 10 FTE answer 12,000 messages/per week in California)
4. **Flexible:** Can adjust “open” hours and surge staff to meet volume needs
5. **Insights:** Written feedback illuminates patterns in service delivery, and helps in coaching & supporting staff
6. **Accessible:** Clients who have language or speech barriers can use chat, including with accessibility technology
7. **Cost:** Technology is cheap, and reduces burden on staff, including call centers



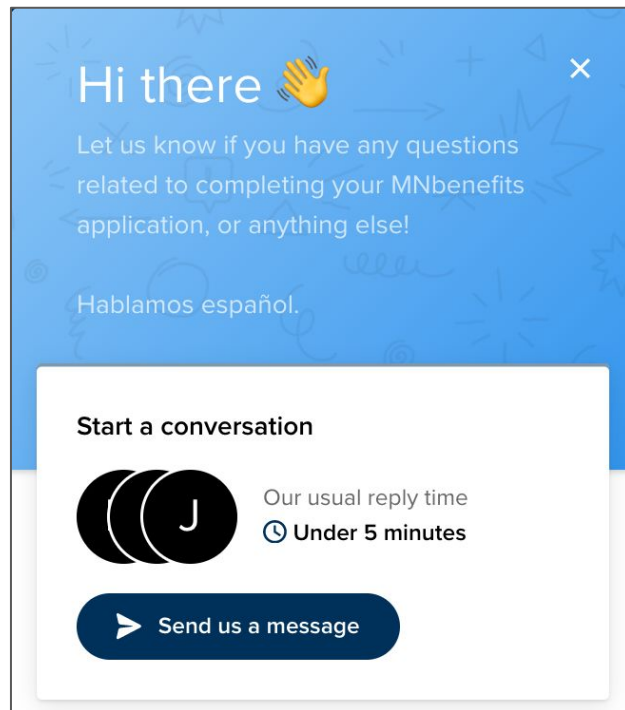
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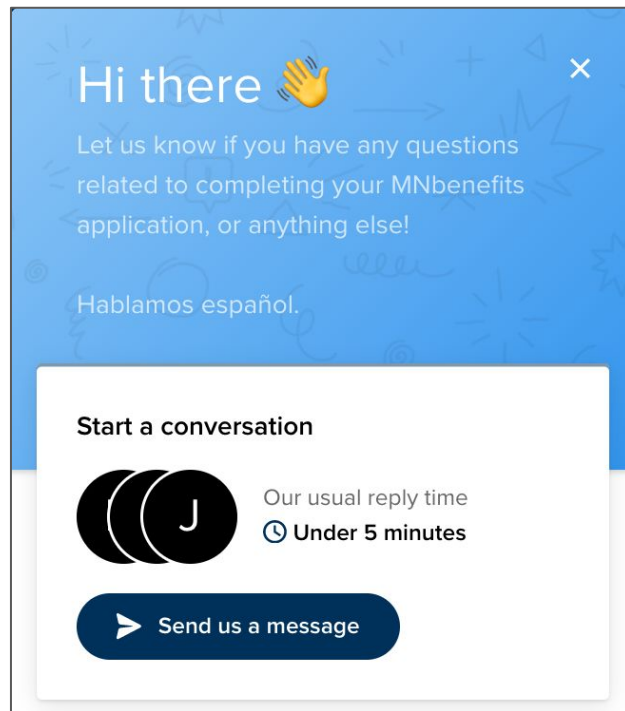
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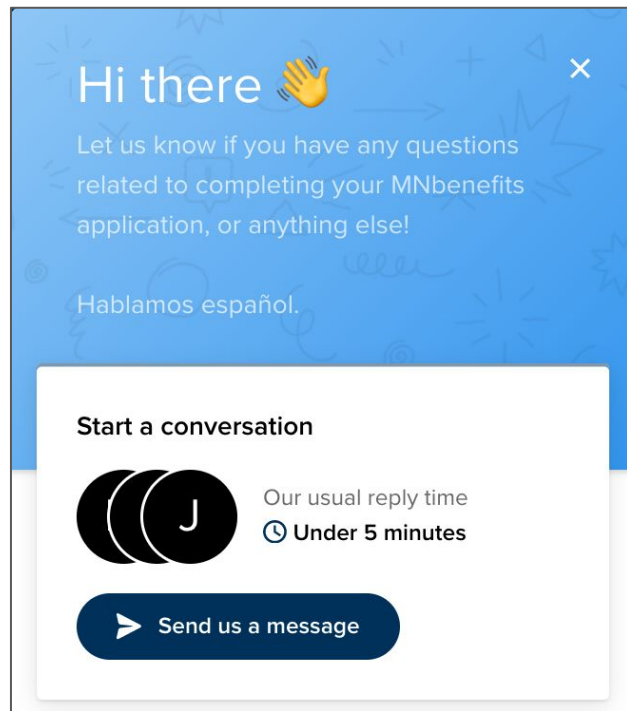
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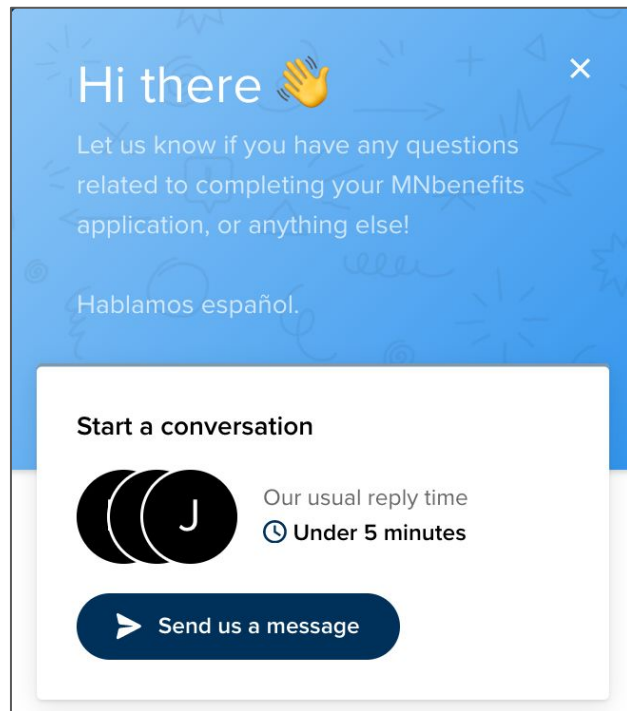
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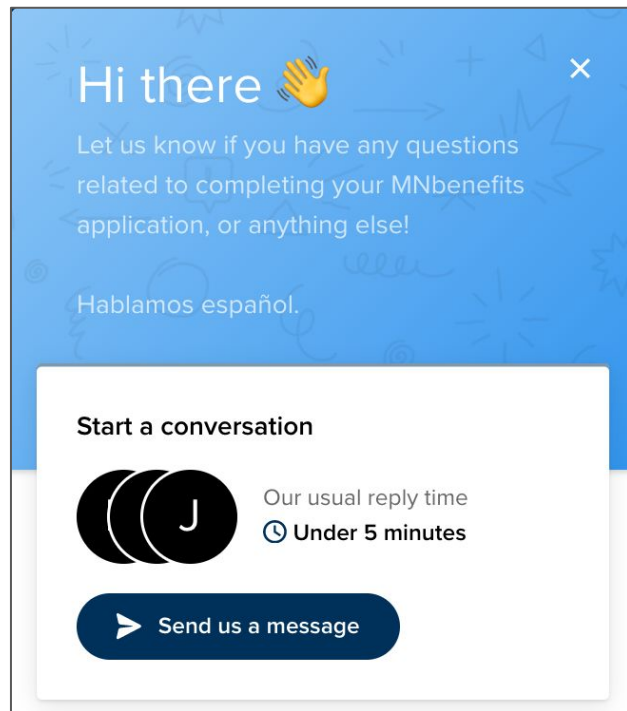
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How chat services support client success

What does chat support look like in Minnesota?

Think of chat as an extension of the services we offer in our offices.

- Responsive during business hours (8am-4pm, Monday-Friday)
 - Business hours reply time averages under 5 minutes
 - 54% of chats are resolved on first contact
 - Median time to resolve conversation: 10 minutes, 45 seconds
 - About 350 chats per week (we expect this to grow)
- Faster than a phone call for you and us
 - Frees up phone time for people who really need to talk to us
- Accept email and chat questions 24/7
- English and Spanish, with ad hoc support in other languages

Staffing model has some important nuances.

- 2 Hennepin staff per day, plus general support on macros and tagging (more on that next)
- It can be a passive engagement - notifications alert staff who can work on other things (don't have to actively monitor)
- Staff comfortably handle 2 - 3 chat conversations at once
- Seamlessly transfer messages to specialized staff (no waiting, as with phone or office visits).
 - Bilingual staff
 - Program experts
- **Be careful not to drive volume between channels.** The best use of chat is when staff can resolve any question within chat, rather than bouncing between services. We're working toward this now.

What does chat support look like in Minnesota?

While it is similar from a staffing perspective, it's a much different service from a client perspective.

Residents can ask questions 24/7. We know that more than 30% of MNbenefits applications come in outside of business hours - residents want to engage with you at all hours!

We also believe the anonymity and text-based service helps some residents feel more comfortable telling their story and asking for help.

This is a great benefit for residents feeling shame or stigma when engaging in person or even over the phone.

39% of residents prefer live help over phone

54% of residents prefer live support over chat

-2021 Wilder Foundation research

What does chat support look like in Minnesota?

New conversations ⓘ

4860 ▲1,654

New inbound conversations ⓘ

4860 ▲1,654

Conversations replied to ⓘ

4604 ▲1,941

Closed conversations ⓘ

4886 ▲1,681

Open conversations ⓘ

24 ▲3

Snoozed conversations ⓘ

0 -

Reopened conversations ⓘ

2019 ▲895

Replies sent ⓘ

8223 ▲3,368

Busiest period for new conversations

Mon, 12pm

Some chats help clients get their application “right” the first time, making processing easier.



Does SSI [income] count for SNAP?



Is rent part of shelter costs?



Does “your household” pertain to the client or all of their housemates?



I don't understand this question about working or making income the making income what does that mean

Other chats are not related to the application specifically, but easy for us to support the client.

“

I want to apply for health insurance.

“

My EBT balance isn't updating.

“

I moved to Ohio and need verification that I no longer get benefits in MN.

“

I needed to fill out a 6 month renewal form but cant find it on this site so i just filled out a new app is that correct way to do it so my case dont get closed



I was told to submit recent paystubs, but I recently lost my job, and will be starting a new one within the next week or so hopefully, so I don't have paystubs to submit. What should I do?

Hello,

You will still want to submit your last paystub as well as proof that you're no longer working at that company. This could be separation paperwork or a written statement from your former employer regarding your last date of work, your last paycheck date and amount.

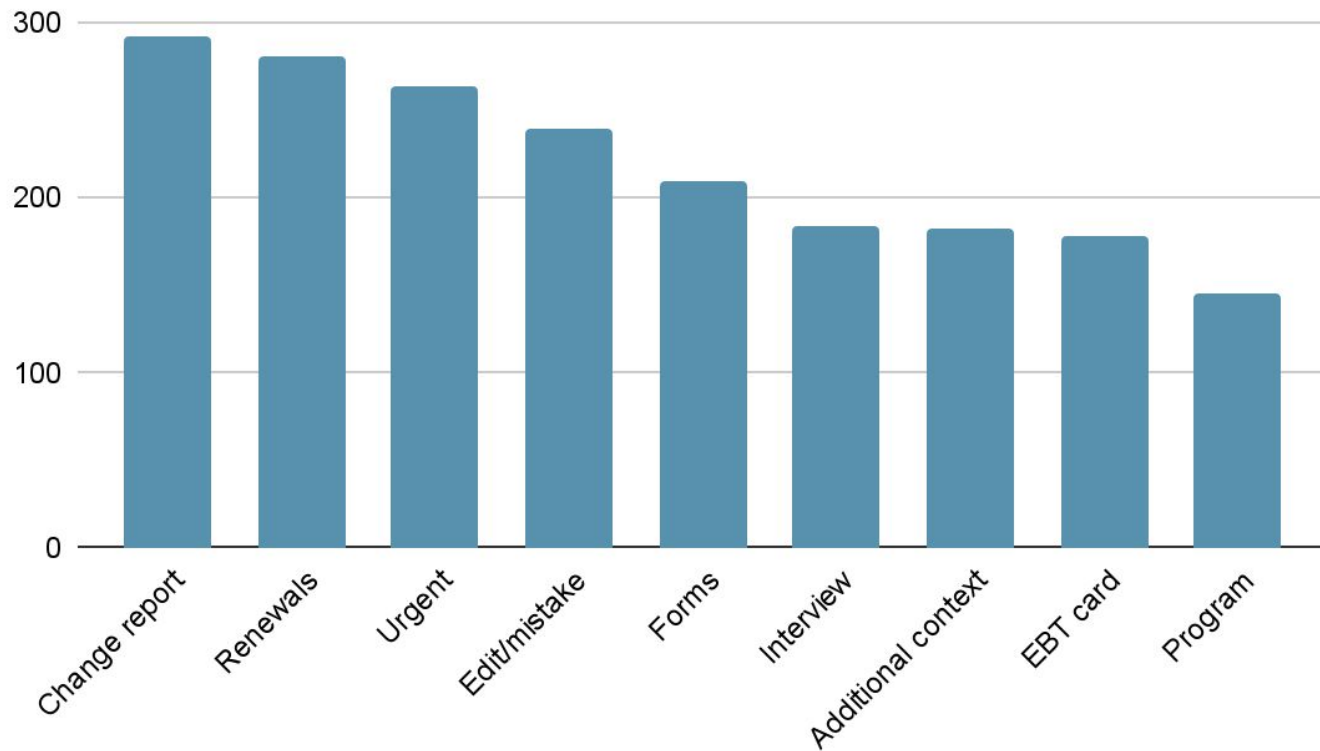
**You could also have your former employer complete the form below:
Authorization for Release of Employment Information ([DHS-2146](#))**

Please let us know if you have any other questions!

Two key features make chat more helpful and efficient for clients and staff.

1. ***Tagging*** illuminates trends in client need
2. ***Macros*** help staff respond quickly and accurately.

Using tagging, we can identify trends in need.



Key to responses: Macros!

Macros are reply/response templates that we save to Intercom. This allows the team to respond to common questions in a timely manner, and have access to resources within a specific county.

Hennepin

Updated by Andrew just now · Used 58 times in the last 30 days

You can contact Hennepin County for more information on the status of your application. They can be reached by phone at 612-596-1300.

You can submit documents for your case through the following methods:

Email: hhsews@hennepin.us
Online: <https://www.mnbenefits.org/pages/identifyCounty>
Fax: 612-288-2981

+ Add an action

Violet Balloon from San Francisco

Add conversation title

hello, do u know wat hennpin's phone # is? thx

Now ·

MN Benefits typically replies in under 1h.

Give the team a way to reach you:

Now · Auto reply · Seen

Operator asked for Email and Phone just now

Reply Note

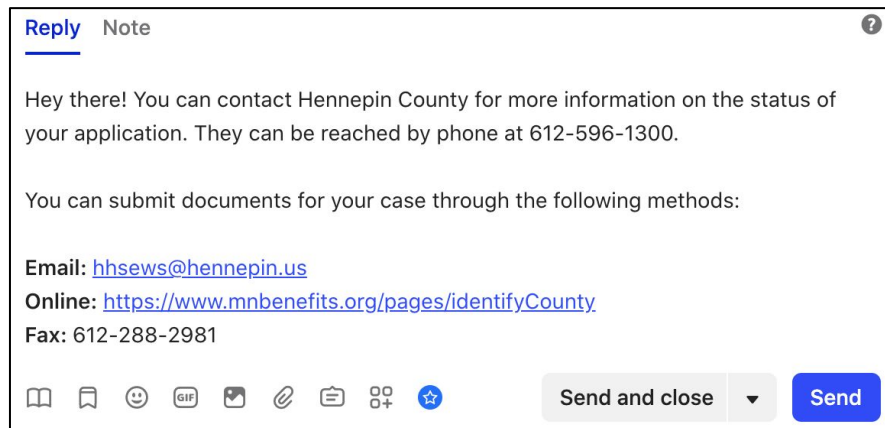
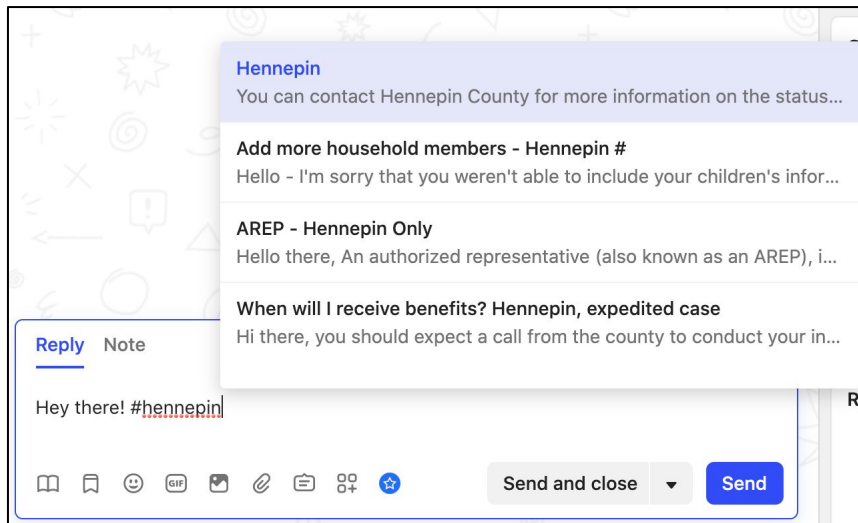
Type # to add a macro

Send

Macros offer efficient and specific replies to common client questions.

- Local office contact information
- Document submission tools
- Explaining programs and services that are offered in the digital application
- In-app questions
 - “What do I put down if I don’t have an address?”
- General information
 - Links to community resources, such as 211, food banks, etc.
 - Program process expectations
 - Resources for other programs (Medicaid, WIC, unemployment, etc)

Our team develops and refines macros over time, and uses keyword shortcuts to reply with them.



How chat services create actionable feedback loops

There are many ways to gather feedback.

**Community
Meetings**

Surveys

Comment Boxes

Call Center Data

Web Analytics

Chat Services

Chat services can play a unique role in your ecosystem.

Community
Meetings

Surveys

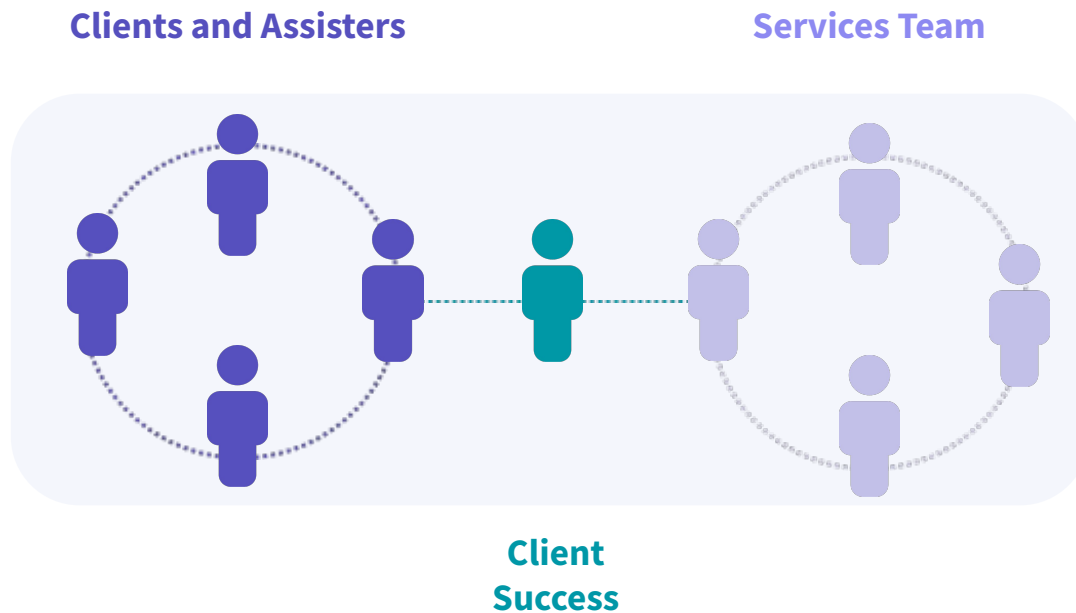
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Call Center Data

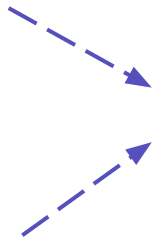
Web Analytics

Chat Services

Chat creates a feedback channel to learn about pain points and solutions from clients in real time.



Chat creates a feedback channel to learn about pain points and solutions from clients in real time.



Week of 5/9 - 5/13

- Program explanation/eligibility
 - If someone is hospitalized do they lose the housing grant?
 - Hello I wanted to see if i qualify for the MSA program. Minnesota Housing Assistance for Seniors since I am on a MA waiver program .
- Case status
- Proof of benefits
 - I am trying to get a Supplement Aid Benefits Letter to prove my income to get my housing voucher
- Other programs/services
 - Do you help with State IDs and social security cards replacements
 - Healthcare
- Benefit issues
 - I was suppose to get my snap yesterday and have yet to receive it. I filled out my 6 month report

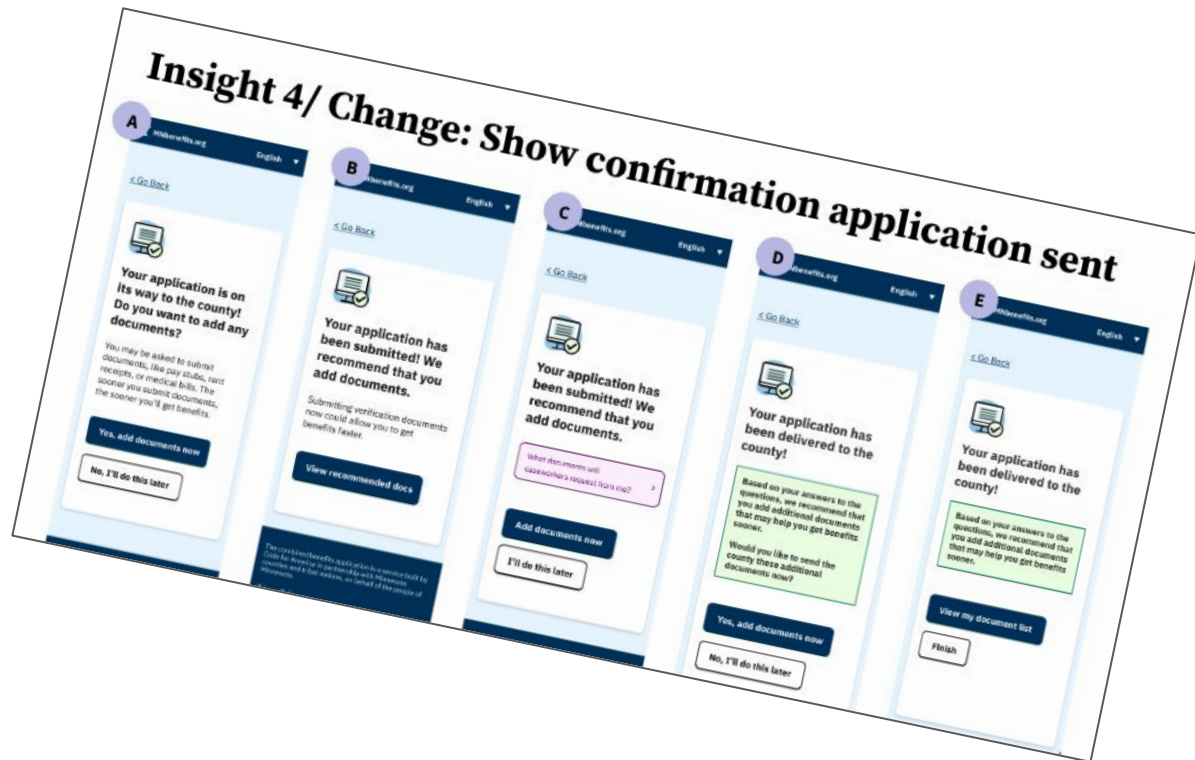
EACH WEEK, CLIENT SUCCESS STAFF DRAW OUT FEEDBACK FOR THE PRODUCT TEAM TO EVALUATE AND ACT ON

Example 1: Document upload challenges



I don't know how to upload the picture. I have filled out the application for MNbenefits.mn.gov and got stuck on the last request to upload document. Is there a phone # to call, I'm 70 yrs old and need help? Computers and I don't get along well.

I'm stuck, how do I just finish, I've filled out the entire app. other than the photo?



Example 2: Finding Forms & Other Help

“

Hello, is it possible to submit a Combined Six-Month Report form electronically instead of completing a printed form?

“

Hello, I'm looking for resources that could possibly help with late rent.

Frequently Asked Questions

Apply now →

I need to submit a form, but I can't find the right one. Where can I get it?

[DHS Shelter Verification Form](#): Use this form to report how much you spend on housing costs.

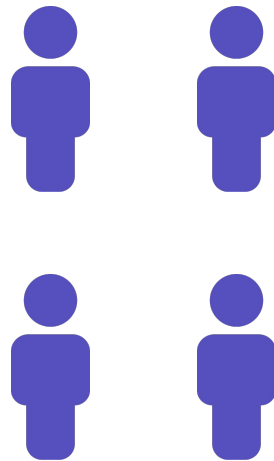
[DHS Authorization for Release of Employment Information](#): Use this form to report your income. You can also use this form to grant permission to your county to reach out to your employer on your

Resourcing client support services

A small team and a thoughtful approach can make starting with chat services easy.

With strong processes, a small team can handle a large volume of inquiries. One experienced FTE can answer 500-1000 messages/per week.

We recommend a “client success lead” role who reviews tagging, creates macros, and troubleshoots separately from the day-to-day response team.



There are limited technical and licensing costs

1. Select a chat solution.

We use Intercom, which costs \$80 per worker license each month, or about \$5000-\$10,000 annually.

Other options include Zendesk, Zoho, Salesforce, etc. There are many!

2. Implement and maintain a chat solution.

Work with your agency or vendor teams to add chat to agency website. Expect ongoing but minimal maintenance needs (e.g. customizing the button location).

This goes best when you have a strong technical lead (e.g. product manager).

Lessons & Looking Ahead

Final lessons and reflections

1. **Chat works because it is backed by talented people - our eligibility staff.**

Office Support or Chatbot are possibilities for future with increased volume.

2. **Creating a new feedback channel creates new expectations from clients.**

People will interact with you in new ways, so you must bring a flexible mindset and constantly reassess and iterate to make sure it's working.

3. **Create a seamless experience across residents' channel of choice.**

Chat is an important tool in our toolbox, not a one size fits all solution.

We're excited about how to keep improving service delivery with chat.

Expanding to support direct, case-specific eligibility processes

- Verifications and case status
- Change reporting
- Casenoting

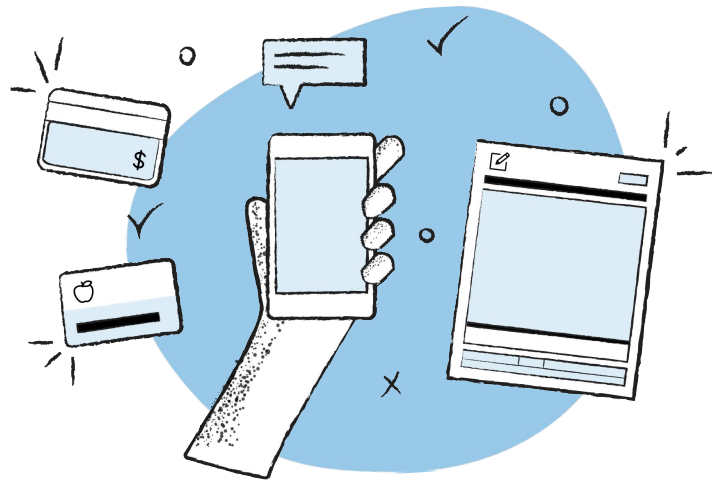
Improve and iterate on security and privacy

- Identity validation
- Data and communications consent
- Records retention

Technical support in the moment

- Application corrections
- Document upload

Deepen multi-lingual services





Your response means a lot to me and is more comfortably informative than you might think. Thank you!



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Thank you for attending!

Code for America recently launched an RFI for states, tribal nations, districts, and territories interested in improving the equity, accessibility, and customer experience of safety net benefits programs, including client feedback loops.

Apply by July 8th here:

www.codeforamerica.org/programs/social-safety-net/rfi/

If you have specific questions about chat services, staff training, etc, please reach out!

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Jeff - jeffrey.hendrix@state.mn.us

Andrew - axie@codeforamerica.org

Dustin - dustin@codeforamerica.org