PROCESS MAP
MANITOBA REMOTE HELP SERVICE

bridgeable

Steps (end-to-end process)	Discovery	Intake	Triage	Hand-off	Support	Follow-up
Description	The moment a member of the Manitoba community learns that the remote help service exists.	The start of the conversation between the agent and client where the agent gathers information about the client to assess their needs.	Continued conversation between the agent and client to make a decision about next steps. Agent will either provide support or identify a partner organization to refer the client to for more in-depth support.	A client with a complex issue is connected to one of the partner organizations for support.	The client receives support for their need(s). If there are multiple needs to address, the client may contact multiple organizations as identified by the help service agent.	The actions taken from the agent to document the interaction and/or follow-up with additional support to the client. Agent captures and shares best practices with others.

FRONT OF HOUSE
Interactions with help service agent

- ● Independent client action
- ● Chat interaction
- ● Call interaction
- ● Partner organization interaction
- ◆ End of client journey

A Independent discovery

Trusted referral

Decision to contact the help service

Sends a message to the service

Receives auto-reply

2 Brief response detailing their situation

D 4 Agent may prompt client to call

Calls the service

Listens to IVR

Agent introduces themselves and the service

Client describes their situation
3

Client answers agents' clarifying questions

Simple cases: ◆ Agent provides information and/or instructions

Complex cases: Agents informs the client what service they will be referred to and why

Multiple referrals: Client may be provided with different options
F 5

Client may be prompted to contact partner organization(s) independently

G 6

Agent informs the client that they are connecting with the partner organization and puts client on hold

Call is answered

Call goes to voicemail

Agent takes client off hold

Agent takes client off hold

Agent introduces client to partner org intake personnel

Client leaves a message
7

Partner org connects with client 1-on-1

If no response from partner organization within 1 day, client may call the help service back

Client transferred to staff member

Client explains their situation to intake personnel
8

Client books an appointment

Client explains their situation to staff member
8

Client receives support ◆

If referred to multiple organizations, client may call the help service back for assistance with next steps

BACK OF HOUSE
Actions taken by help service agent not visible to the client

○ Service advertising
Emails, phone calls to FRCs to raise awareness of the help service
Distributing tear-aways and posters
Creating Facebook posts
1 B

Agent begins call or SMS chat in Twilio

Agent identifies client needs
C

Agent refers to Twilio for quick links as needed
D

Agent accepts the task and begins call/text notes in Twilio

Agent assesses complexity of client situation and determines next steps
E

Agent connects the call to partner organization

Agent briefly summarizes client needs to partner org intake personnel
H

Agent hangs up

Agent finalizes notes (i.e. if follow up is required) and closes the task in Twilio
I

Agent may follow-up with client (no formal procedure)
J 9

Updates notes in Twilio (ongoing throughout conversation with client)

Checks the call log in Sharepoint, and responds to unanswered texts and clients who require follow-up in Twilio

Tools and resources
○ (T) Resources within Twilio

Facebook
Tear-aways and posters
Personal networks

(T) Client 'task' (information entry form used for each client)
Quick links to resources (ex. Prosper Financial Relief Navigator)
Call log in Sharepoint

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Relationship/familiarity with partner organization intake personnel
Call log in Sharepoint

Call log in Sharepoint

Observations
Aspects of the current process that are inconsistent or impact the overall delivery of the help service. Observations speak to moments that will benefit from further attention.

A Trust is essential
Client fears may dissuade them from contacting the help service but these fears are often resolved by an agent. Trust should be established before the client event contacts the service.

B Sharing through networks
Informal sharing through personal and professional networks occur (1) on Facebook, where local organizations are resharing posts from SEED/CFCS, and (2) through email, where some agents may tap into personal networks to spread awareness.

C Varied approaches to identifying client needs
Agent approaches to identifying client needs vary based on personal knowledge and experience. Tactics include listening for key words, leveraging knowledge of services offered in partner organizations, and prioritizing needs based on inter-dependencies (ex. clients must have ID in order to file their taxes).

D Agent capabilities within chat
The chat channel is limited in its ability to support agents in identifying and addressing complex cases. For this reason, when complex cases are surfaced, some agents may request that chat clients call in so that they can better gauge emotions and client needs.

E Varied approaches to determining next steps
The means by which a client's needs are resolved is dependent on the agent's experience. New agents have limited knowledge and focus their efforts on ensuring they make the correct referral recommendation. More experienced agents are more likely to provide immediate support and resolution, only choosing to refer if the case is complex.

F Varied approaches for multiple referrals
There is no formal process for multiple referrals. Agents may provide the client with three options: 1) to independently contact partner orgzanizations themselves, 2) to call the help service for hand-off to each partner, 3) for the help service to contact partners on their behalf

G Unofficial "workarounds" for chat hand-offs
Unable to provide warm hand-offs via chat, agents employ inconsistent processes for chat hand-offs. Agents may send referral instructions to clients via chat, or request that chat clients call in for a warm hand-off.

H Varied levels of information transfer to partner organizations
What information is communicated to partner organziations during hand-off is decided by the agent. Agents may contact the partner organization with additional information, especially for voicemail clients.

I No consistent process for flagging required follow-up
Some agents may determine that a client requires a follow-up call/chat depending on the complexity of their case. Currently, clients do so by adding to the general notes section.

J Individual follow-up processes
Some agents may take it upon themselves to follow-up with clients personally, which may include asking the client for permission to follow up via a phone call. Agents may make personal notes outside of Twilio as a reminder to follow up the next day, or make a note in Twilio to prompt fellow agents to follow up. In some cases agents may contact the referred partner organization to determine whether the client has been helped.

Pain points
Moments when the client experience may be negatively impacted. Pain points have the potential to compound and become **drop-off points** for clients.

1 Low client volume
"Currently, low call volumes limit the impact of the service and reduce opportunities for agents to gain hands-on experience.

2 Disjointed and slow chat responses
Client responses in chat can range from 20 minutes to 3 days, making it challenging for agents to anticipate when engagement is required and to provide continuity in which agent responds.

3 Emotional states
Emotional or mental health challenges may impact the client's ability to participate and the agent's ability to help. The client may end the call, or the agent may suggest they take a break and call back.

4 Chat does not offer adequate support for complex cases
In complex cases, the client using chat may be prompted to call in. Often this leads to being connected with a different agent than the one they were orginially messaging, creating a point of discontinuity.

5 Documenting information for multiple referrals
It is not possible to conduct a warm hand-off to multiple organizations in the same call. When clients choose or are instructed to contact partner organizations independently, they may not accurately record agent instructions or remember what the agent recommended. As a result, clients may not continue to contact their referrals after accessing the first service, even though their needs are unmet.

6 Chat hand-offs cannot guarantee access to support
Agents cannot provide a warm hand-off to partner organizations through chat. When chat clients are instructed to contact partner organizations independently, there is no guarantee that they will follow-through on these referrals. Clients may stop seeking support.

7 Voicemails impact access to support
If the partner organization is unavailable, the client and agent must leave a voicemail message. Feeling discouraged or frustrated, the client may choose not to leave a message. Some clients may not have access to a stable phone number to receive a call back.

8 Repetition leads to a poor experience
Accessing support from a partner organization may require the client to repeat information that they had shared with the help service agent during the initial intake and triage process. Clients may feel frustrated repeating themselves in an (already) stressful circumstance and this may trigger an emotional response.

9 Limitations in client contact
Clients may not have access to a reliable phone number where they can be reached for follow-up. Clients with phone access may have limited minutes or personal capacity for follow-up calls.