

# San Francisco Human Services Agency

## Opportunity

The Human Services Agency of San Francisco, California is comprised of a number of critical programs that the city's residents rely on every day. These include help with food, health insurance, supportive care, financial assistance, child care, and more.

Two programs run by the agency, CalFresh and Medi-Cal combined their contact centers, which created scheduling challenges. Up to that point, both programs were using spreadsheets which were not sufficient. Even worse, 75% of CalFresh and Medi-Cal employees (who did not work the phones) were monitored with separate spreadsheets. They did determine how groups and agents could be moved to assure sufficient coverage, but the process was very manual, disorganized, tedious and time-consuming. Thus, an effective scheduling tool became a priority.

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

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 The Human Services Agency of San Francisco. "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."

The search for a better technology solution began 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.

## Solution

Once the process was complete, The Human Services Agency of San Francisco chose Verint® Monet Workforce Management™ (WFM). Today, The Human Services Agency of San Francisco is staffed with over 500 contact center agents using Verint Monet WFM to improve forecasting and scheduling.

**VERINT.**  
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## Customer Success Story



### Solutions

Verint® Monet  
Workforce Management™



### Industry

Social Services



### Region

Americas

## Results

- Improved calculations of shrinkage, planning, forecasting and scheduling
- Simpler and more efficient scheduling models
- Easy to use system for automatically shifting schedules to close coverage gaps

“In this type of environment there are so many different things that might happen in a given day. The value of Verint Monet WFM for us is the transparency it provides - everyone knows what everyone is doing.”

- Taninha Ferreira, Operational Manager, The Human Services Agency of San Francisco

## Benefits

Among the benefits cited as reasons for the selection of Verint Monet WFM, most importantly the customization and reporting capabilities of the solution were important to The Human Services Agency of San Francisco. Their supervisors now have insight into individual and group schedules as well as providing the ability to review critical reports.

Since The Human Services Agency of San Francisco was building contact center schedules over several months, the accounting of resources is more accurate and more up to date, and they can determine the number of hours employees spend in training, meetings, overtime, calling out sick, etc. The implementation of Verint Monet WFM in the cloud has brought The Human Services Agency of San Francisco more visibility, accuracy and transparency on the agents' schedules. When employees take vacation or sick days, as frequently happens, Verint Monet WFM makes it easy to immediately and automatically shift schedules to close the coverage gap(s).

Following the selection of Verint Monet WFM, Ferreira says The Human Services Agency of San Francisco has experienced “total improvement.” Schedules are now built out months in advance, 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.

The solution is also 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 happen in a given day. The value of Verint Monet WFM for us is the transparency it provides – everyone knows what everyone is doing,” Ferreira said.

## The Customer Engagement Company™

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