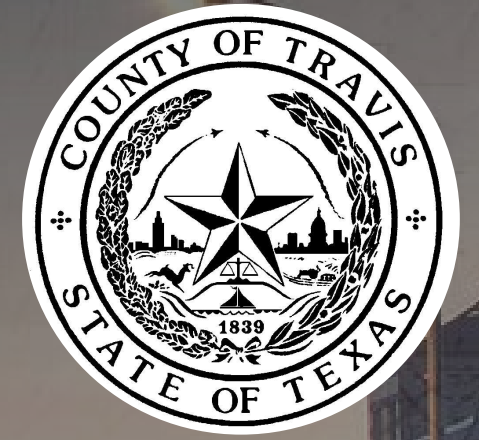


Deloitte.



Travis County HHS

Business Process Assessment Services – Project Kickoff

February 13, 2020

Travis County ECMS Project Kick-off Agenda

OBJECTIVES

By the end of this kick-off, we will achieve the following:

- ❑ **Set the tone for the ECMS Vision:** Identify key themes to inform project vision, goals, and objectives
- ❑ **Connect to the bigger picture:** Understand the broader shifts that are transforming work and technology
- ❑ **Align on project approach:** Review project approach and timeline
- ❑ **Identify ways to work together:** Understand work style preferences and how we can adjust to work more effectively

OUTPUTS

- ❑ Key themes that will serve as inputs to project vision, goals, and objectives
- ❑ Understanding of project context in terms of broader changes
- ❑ Insights about each other and how we work together in teams

Agenda Item	Description	Speaker	Duration	Time
Opening	Greeting and opening remarks	Sherri and Molly	5 minutes	10:00-10:05
Introductions	Team members provide short introductions	Deloitte	5 minutes	10:05-10:10
Part 1: Laying the Foundation				
The year is 2025 Gallery Walk (Interactive)	Participants view and react to responses to the 2025 ECMS pre-kickoff questionnaire	Deloitte: Mayra	15 minutes	10:10 – 10:25
Future of Health and Human Services	Set the stage for the ECMS project in the context of broader shifts in terms of work, the workforce, and the workplace. What does this look like for Travis County HHS?	Deloitte: Libby Bacon	30 minutes	10:25 – 10:55
Break			5 minutes	10:55 – 11:00
Part 2: Review the Blueprint				
Approach	Overview of project approach, timeline, methods, and roles and responsibilities	Deloitte: JR, Eric, and Katherine	15 minutes	11:00 – 11:15
Q&A	Opportunity to ask any questions about content presented	All	10 minutes	11:15 – 11:25
Part 3: Let's Build It				
Business Chemistry (Interactive)	Use Deloitte's Business Chemistry Assessment to understand each other's work style preferences and tips for adapting to engage more effectively	Deloitte: JR and Mayra	30 minutes	11:25-11:55
Closing	Closing remarks	Eric and Mayra	5 minutes	11:55-12:00

Introductions

Meet the Deloitte Team



Aldila Lobo
Project Executive



Libby Bacon
Project Advisor



J.R. Ruiz
Project Manager



Mayra Marquez
Project Deputy



Eric Egan
Team Lead

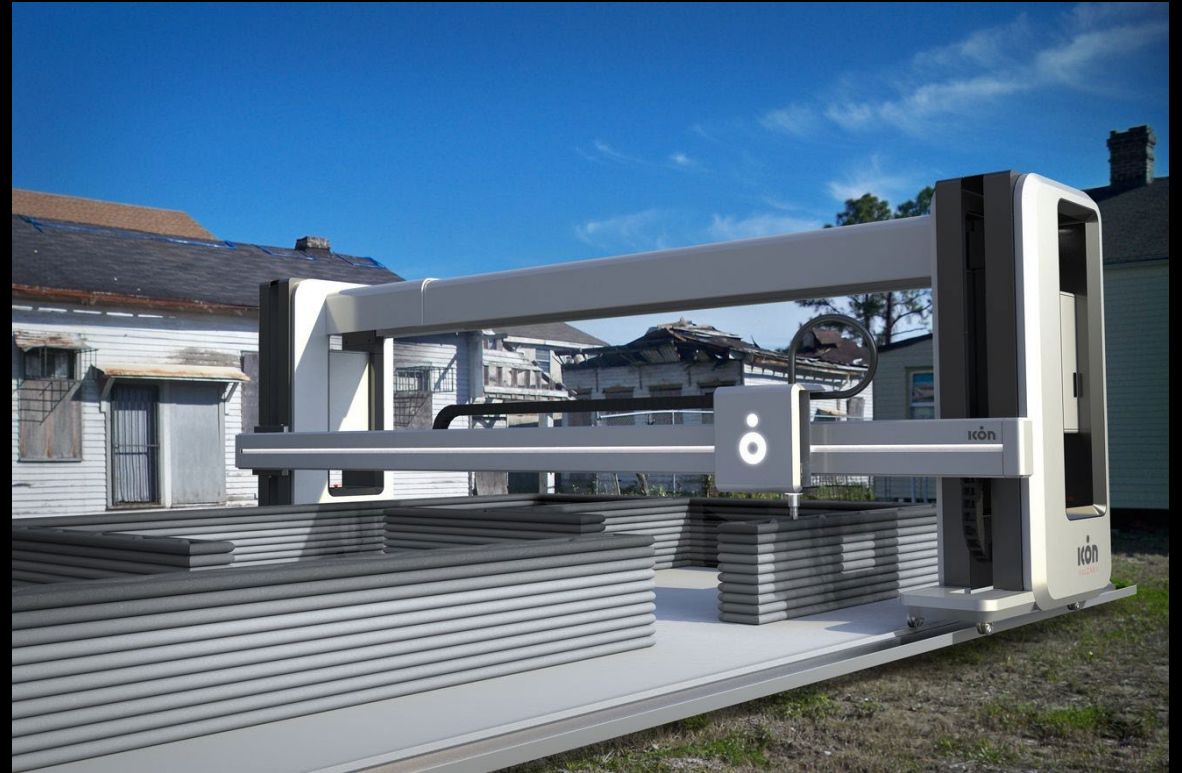


Katherine Jones
Design Lead



Dave Moore
Lead Analyst

Laying the Foundation: Let's Fast Forward to 2025...



The year is 2025. The ECMS project was completed successfully and is now commonly used across Travis County HHS divisions

Walk around the room and look at the responses to each of the questions. Use dots and post-its to capture your reactions to the following:

➤ What responses stand out to you/What do you like? ●

➤ What surprises you? ●

➤ What is missing? ■



Future of Health & Human Services

These forces – what we call the “7 disruptors” at the intersection of technology and people – are driving the Future of Work

TECHNOLOGY-DRIVEN



Technology is Everywhere

6.0 billion+
smartphones in the world by 2020¹



AI, Cognitive Computing, Robotics

\$500,000 in 2008
\$22,000 today



Tsunami of Data

9x more in last 2 years²
Major enabler of machine learning

7

DISRUPTORS



Jobs Vulnerable to Automation

35% UK
47% US
77% China⁶



Explosion in Contingent Work

US contingent workers **40%** by 2020⁷



Diversity & Generational Change

Millennials **50%**³
25% global pop in Africa by 2050⁵
Longevity Dividend – **50 year** careers⁴



Change in Nature of a Career

2.5 – 5 years: Half-life of skills
4.5 years: Average tenure in a job⁸

PEOPLE-DRIVEN

1. <http://news.ihsmarket.com/press-release/technology/more-six-billion-smartphones-2020-ihs-market-says>

2. <https://www-01.ibm.com/software/data/bigdata/what-is-big-data.html>

3. Annual Global Millennial Study, <https://www2.Deloitte.com/uk/en/pages/about-Deloitte-uk/articles/millennial-survey.html>

4. <https://www.newscientist.com/article/mg23130810-800-the-100year-life-how-should-we-fund-our-lengthening-lives/>

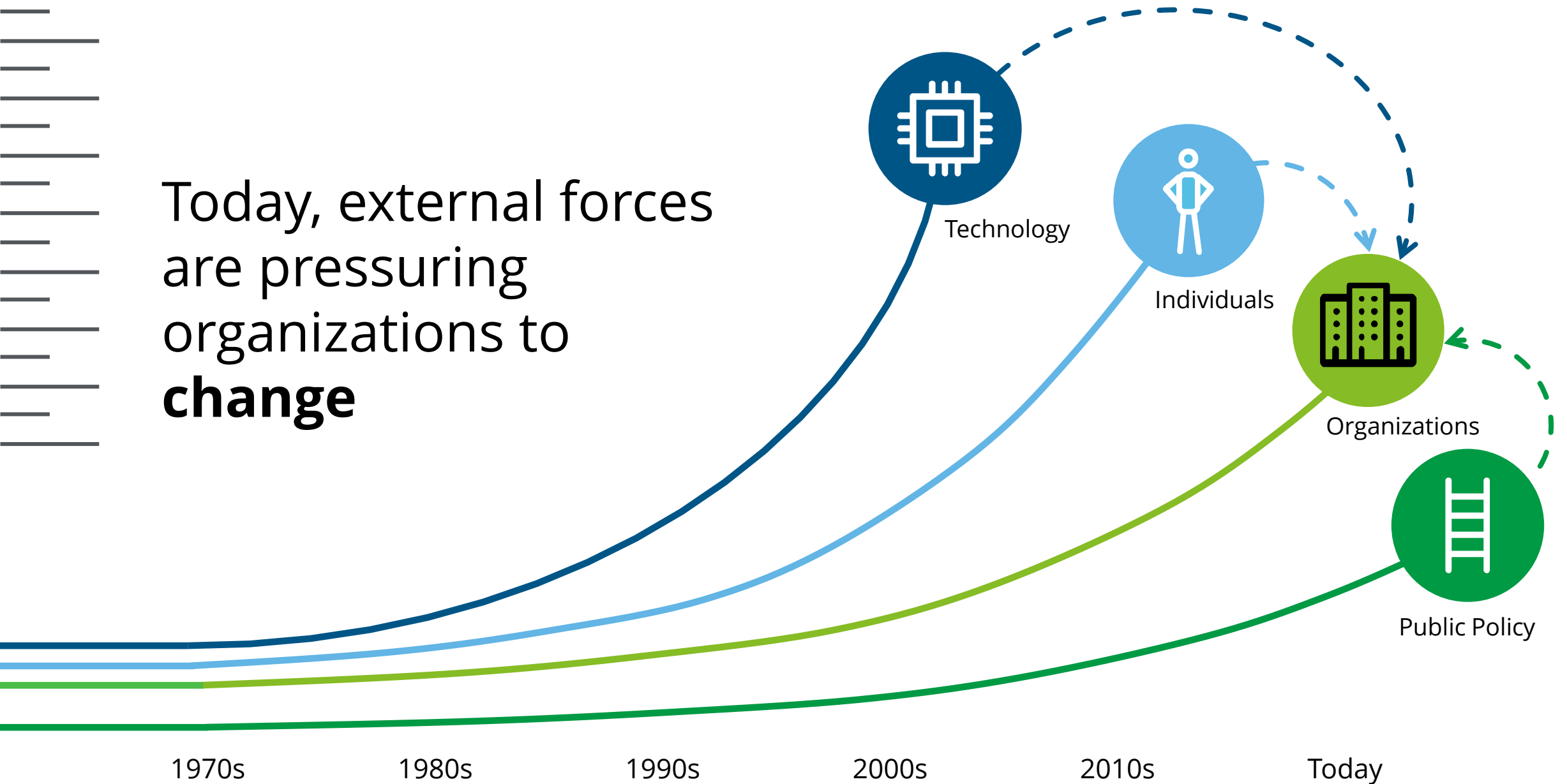
5. https://www2.deloitte.com/content/dam/Deloitte/il/Documents/human-capital/Thriving_in_times_of_digital_disruption.pdf

6. http://www.oxfordmartin.ox.ac.uk/downloads/reports/Citi_GPS_Technology_Work_2.pdf

7. Intuit 2020 Report: Twenty Trends that will Shape the next Decade https://http-download.intuit.com/http.intuit/CMO/intuit/futureofsmallbusiness/intuit_2020_report.pdf

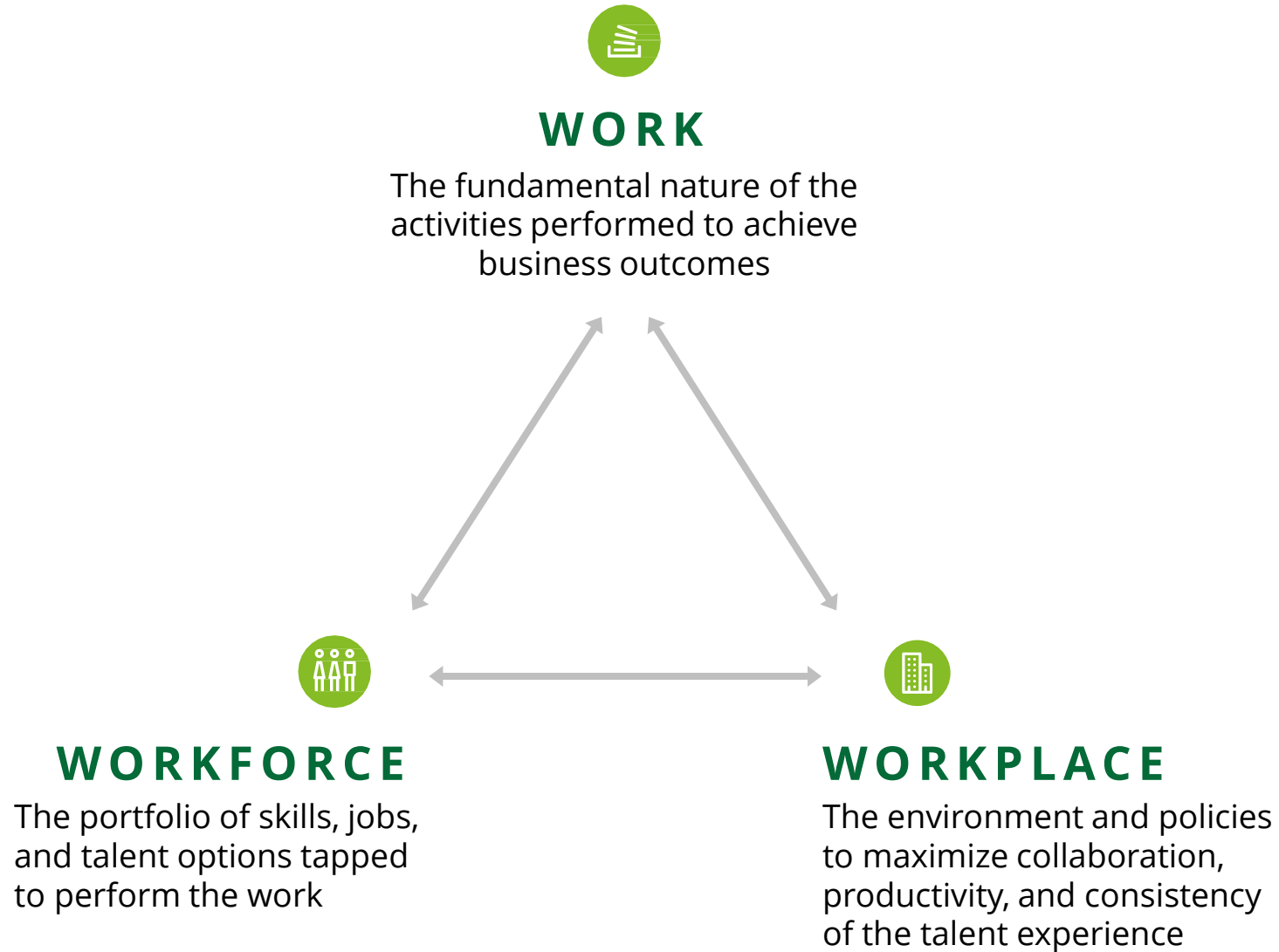
8. <https://www2.deloitte.com/content/dam/Deloitte/global/Documents/HumanCapital/dtll-hc-english-opentalent-economy.pdf>

Today, external forces are pressuring organizations to **change**



The Future of Work...

...includes three broad and deeply connected dimensions of change



Technology is enabling rapid change across HHS, and agencies need to take action to prepare for the...



**FUTURE
WORKER**



**FUTURE
CLIENTS**



**FUTURE
SYSTEM**



Lisa Duarte

Case Worker of the Future
Travis County HHS

RESPONSIBILITIES

- Helps individuals and families create goals, map concrete steps for achieving those goals, and track their progress
- Connects clients to resources in their community – both governmental and non-governmental – to help address their specific needs
- Uses analytics to understand which interventions will be most impactful for a particular client
- Validates automated eligibility determinations for a variety of social services government assistance programs
- Motivates clients to remain engaged and compliant with program requirements

JOB SUMMARY

- Review and validate eligibility determinations generated by cognitive technologies, focusing on improving the well-being of individuals and families in need of assistance
- Work directly with clients to understand and address root causes of their issues
- Collaborate with colleagues in and outside the division to troubleshoot cases. Develop and maintain relationships with other professionals in the social services field
- Stay current on developments in behavioral science, social determinants of health, and effective coaching tools to build and retain rapport with clients

EXPERIENCE

Self-Sufficiency Coach

Travis County HHS
2020-present

Kinship Navigator

Casey Family Programs
2020-2020

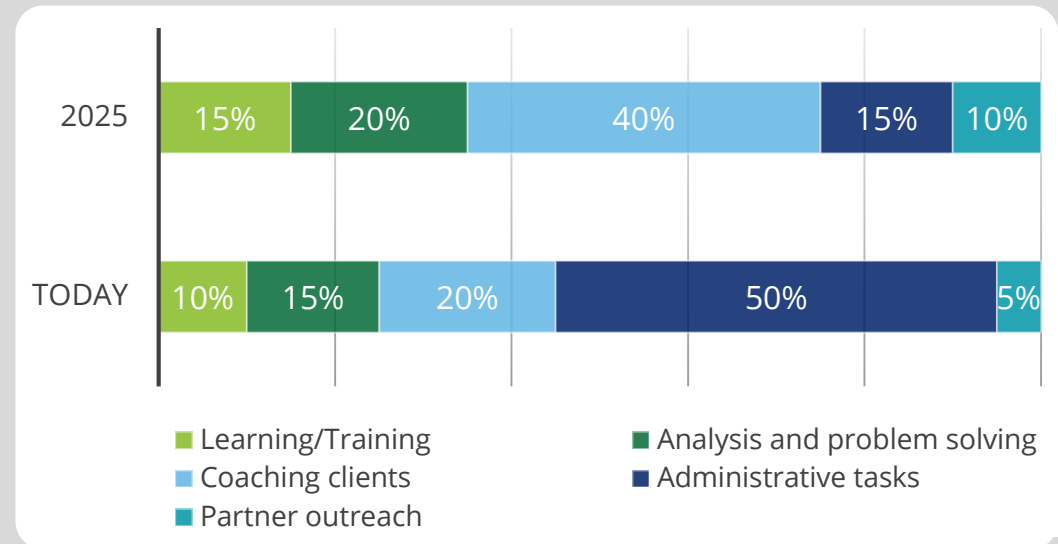
Match Support Specialist

Big Brothers Big Sisters of America
2015-2020

Volunteer

Big Brothers Big Sisters of America
2013-2015

TIME SPENT ON ACTIVITIES



Breakout Discussion Questions

1

What information would you add/modify for the:

- Job Summary
- Responsibilities

2

Do you agree with the current breakdown of time spent on activities? Why/Why not?

3

How would you adjust the time spent on activities based on your vision for 2025?

What questions do you have?

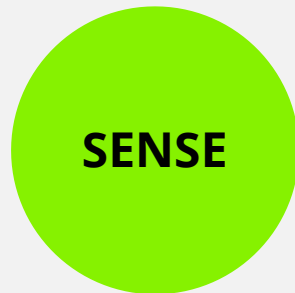
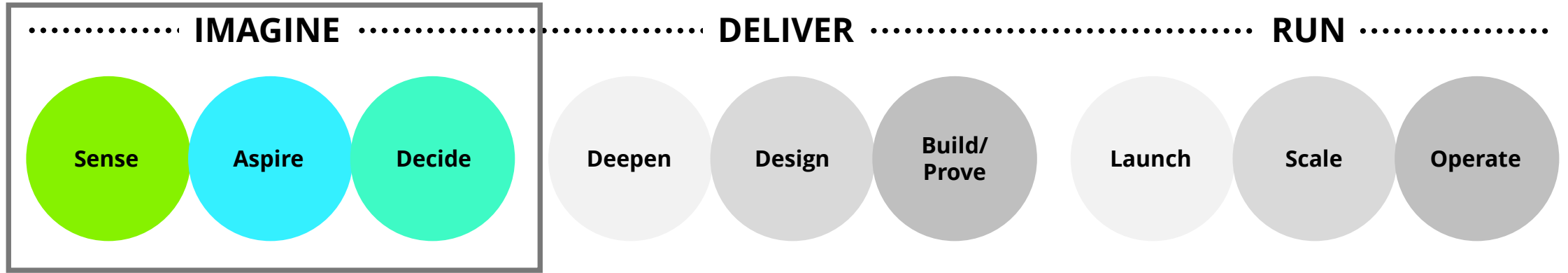
Break

Review the Blueprint: Approach



A roadmap to execution

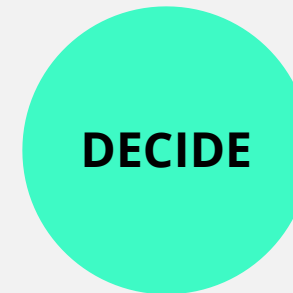
We understand that this is just the initial phase for TCHHS's service transformation journey



Understand the current environment and improvement opportunities across TCHHS's existing business processes, case management system, and client service delivery



Identify and plan your vision for service delivery by mapping future-state processes, technology, and client experience



Finalize the plan for the ECMS project by finalizing operational recommendations and developing a blueprint for the new enterprise-wide client management system

Project Approach & Activities

	SENSE Months 1-3	ASPIRE Months 3-7	DECIDE Months 7-11
Project Management	<ul style="list-style-type: none"> Establish Project Governance Develop Project Management Plan 	<ul style="list-style-type: none"> Continue project management and governance Deliver Ambitions Lab 	<ul style="list-style-type: none"> Continue project management and governance Capture lessons learned and conduct project closeout
Business Process Assessment	<ul style="list-style-type: none"> Perform Stakeholder Interviews Review Procedural and Operational Documentation Develop As-Is Business Process Maps 	<ul style="list-style-type: none"> Assess Improvement Opportunities & Plan Future-State Develop Future-State Business Process Maps 	<ul style="list-style-type: none"> Incorporate Future State Business Process Maps into Recommendations Finalize Future-State Recommendations
System Discovery	<ul style="list-style-type: none"> Explore CABA System Functionality & Understand Technical Components Hold Discovery Sessions to Map CABA Functionality 	<ul style="list-style-type: none"> Document CABA System Inventory Hold Discovery Sessions to Map ECMS Future-State Functionality 	<ul style="list-style-type: none"> Document ECMS data elements and reporting Document ECMS System Requirements
Service Design	<ul style="list-style-type: none"> Perform User Research & Center Observations Develop Modes/Mindsets & Journey Maps 	<ul style="list-style-type: none"> Service Design Planning Draft Service Blueprint 	<ul style="list-style-type: none"> Prototype ECMS Design
Deliverables	<ul style="list-style-type: none"> Project Kick-off PM Plan Business Process Review & Documentation 	<ul style="list-style-type: none"> Efficiency Assessment 	<ul style="list-style-type: none"> Data Mapping & Reporting Requirements System Requirements & Design Document Project Closeout

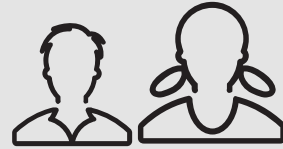
Phase 1 Sneak Peek: Modes & Mindsets

Offers a new way to think about personas and archetypes that intentionally removes clear opportunities for unconscious bias to cloud analysis

Why mindsets instead of traditional personas?

Mindsets are abstract personas, defined by attitudes rather than demographics.

Where personas fail...



The more detailed a persona character—with gender, age, physical ability, and race—the more **we apply our unconscious biases to them.**¹



This clouds and disrupts our ability to effectively evaluate and use data.

How mindsets help...



With mindsets, we define key stakeholder groups by their **thought processes, beliefs, and tendencies**—not their demographics.



This **allows us to design inclusively**, focusing on stakeholders needs.

Modes: the ways stakeholders engage with Travis County HHS

Unlike a linear process flow, modes outline the state of stakeholders through fluid, recurring activities.

Discover

Getting acclimated with HHS services

Maintain

Continue the relationship with HHS programs

Prepare

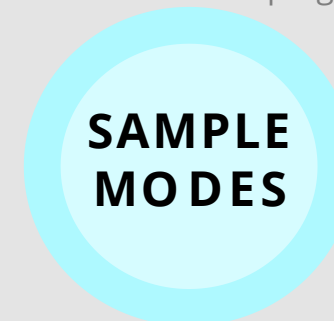
Getting ready to apply for services

Utilize

Access services and find information about benefits received

Apply

Initiating an application or interaction with HHS Programs




Monitor

Understand the status of services

Phase 2 Sneak Peek: Ambitions Lab

During the Ambitions Lab, key stakeholders come together to understand the needs and challenges for ECMS stakeholders, create and prioritize ambitions for its future, and consider what Travis County HHS needs to accomplish in order to attain them.



**PART 1
SENSE**

Review and discuss our current knowledge of our stakeholders, look broadly at trends and disruptors in current and adjacent markets to locate opportunities in the digital landscape


Outcome:
Key Insight about Travis Co. Stakeholders
Opportunity Spaces



**PART 2
ASPIRE**

Understand our level of ambition, test it if appropriate, and develop a set of potential aspirations

Outcome:
Provocations



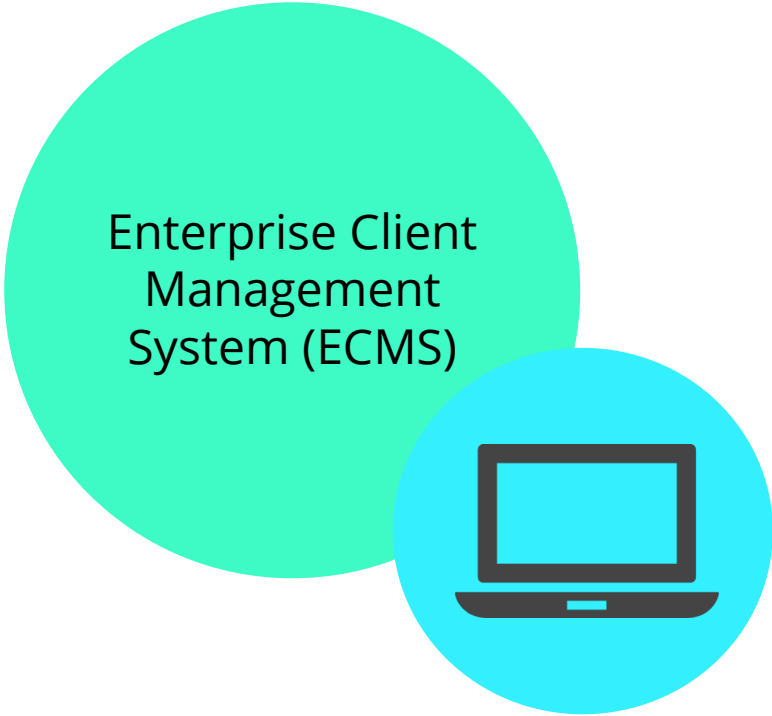
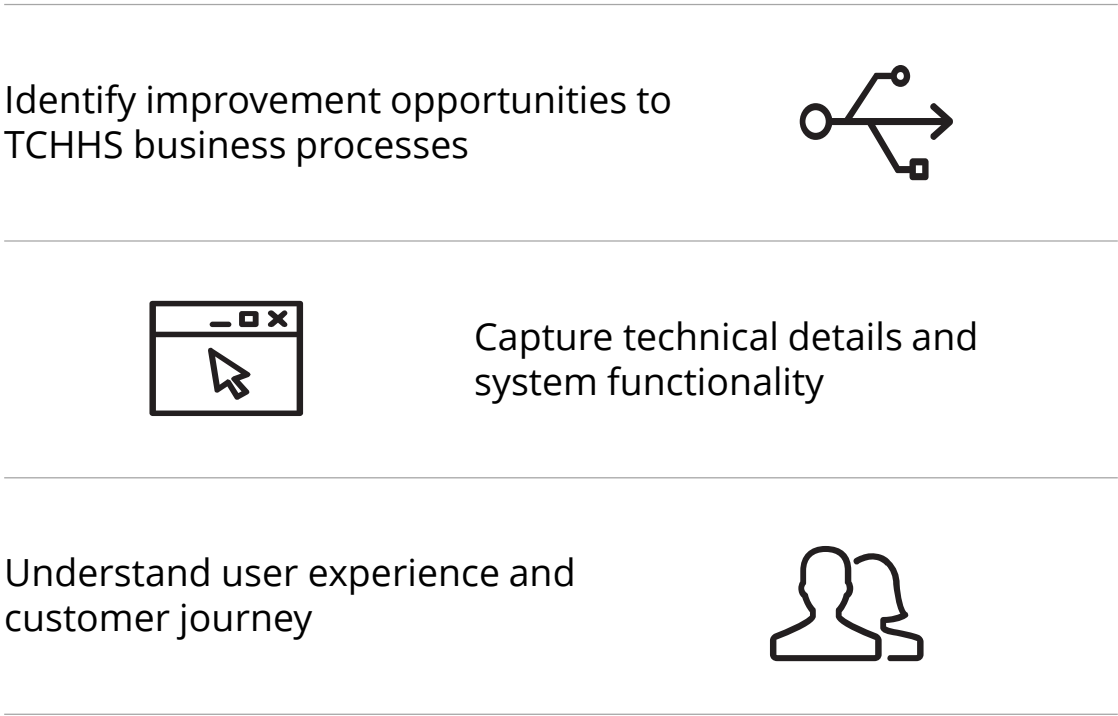
**PART 3
DECIDE**

Discuss and determine the priority of potential aspirations. Consider what 'needs to be true' across the enterprise dimensions for us to achieve our ambition

Outcome:
Primary Ambitions for Travis Co.'s ECMS project and Requirements to get there

Phase 3 Sneak Peek: Blueprint for the Future

The Decide phase synthesizes the research and findings from the project into a clear plan for ECMS



Project Roles & Responsibilities

The ECMS project's success will be based on a shared, collaborative experience across stakeholder groups

TCHHS Project Governance

- **Monitor** and oversee project activities
- **Stay informed** on project communication and updates
- Attend **status meetings** and designated **governance forums**
- **Review and approve project deliverables** as appropriate

ITS

- Act as **liaison between Deloitte and TCHHS** stakeholders and frontline staff
- Participate in **project governance and oversight** activities
- Manage **project communication** and website
- Support **day-to-day project activities**
- **Review and approve project deliverables** as appropriate

Deloitte

- Organize **project activities** and sessions
- **Facilitate interviews** and observations
- Develop and **submit project deliverables** and other documentation
- Provide timely **status reports** and project data
- Help **coordinate project communication**

Division Directors & Managers

- Coordinate with Deloitte and ITS to provide access to **materials and resources**
- Attend **project interviews and meetings** as needed
- Provide **policy and program expertise**
- **Review working documents** and materials as needed

Travis County Frontline Staff

- Provide **subject matter and system expertise**
- Attend **project interviews, meetings, and observations** as needed
- Provide other relevant **information and insight** for project activities

What questions do you have?

Let's Build It: Business Chemistry



What is Business Chemistry?

Focused on **interaction**, not introspection.

Rooted in science, **designed for business**.

Simple application, sophisticated system.

Personalized individual and **team insights**.



Understanding your Business Chemistry Type

Loves & Bugs: Applying your Business Chemistry Type

1

Recall your *dominant* Business Chemistry type

Each corner of the room is labeled with a type. Find your group to begin the activity.

2

Make two lists

- *Your loves*: What do you all have in common that defines your type?
- *Your bugs*: What do you all commonly dislike?

3

Reconnect with the larger group

What did you discover? How can you engage with those who have a different Business Chemistry than you?

The Business Chemistry Types

"You only live once!"



"It's not personal, it's just business."



"Work with me, people!"



"It's all in the details."



Pioneer

Adaptable

Detail-Averse

Spontaneous

Outgoing

Embrace Risk

Imaginative



Perception: Likes & Gripes

“ Big, bold, inspiring and visionary...

...**But** doesn't bother to think through the execution. ”

“ Fun and energetic...

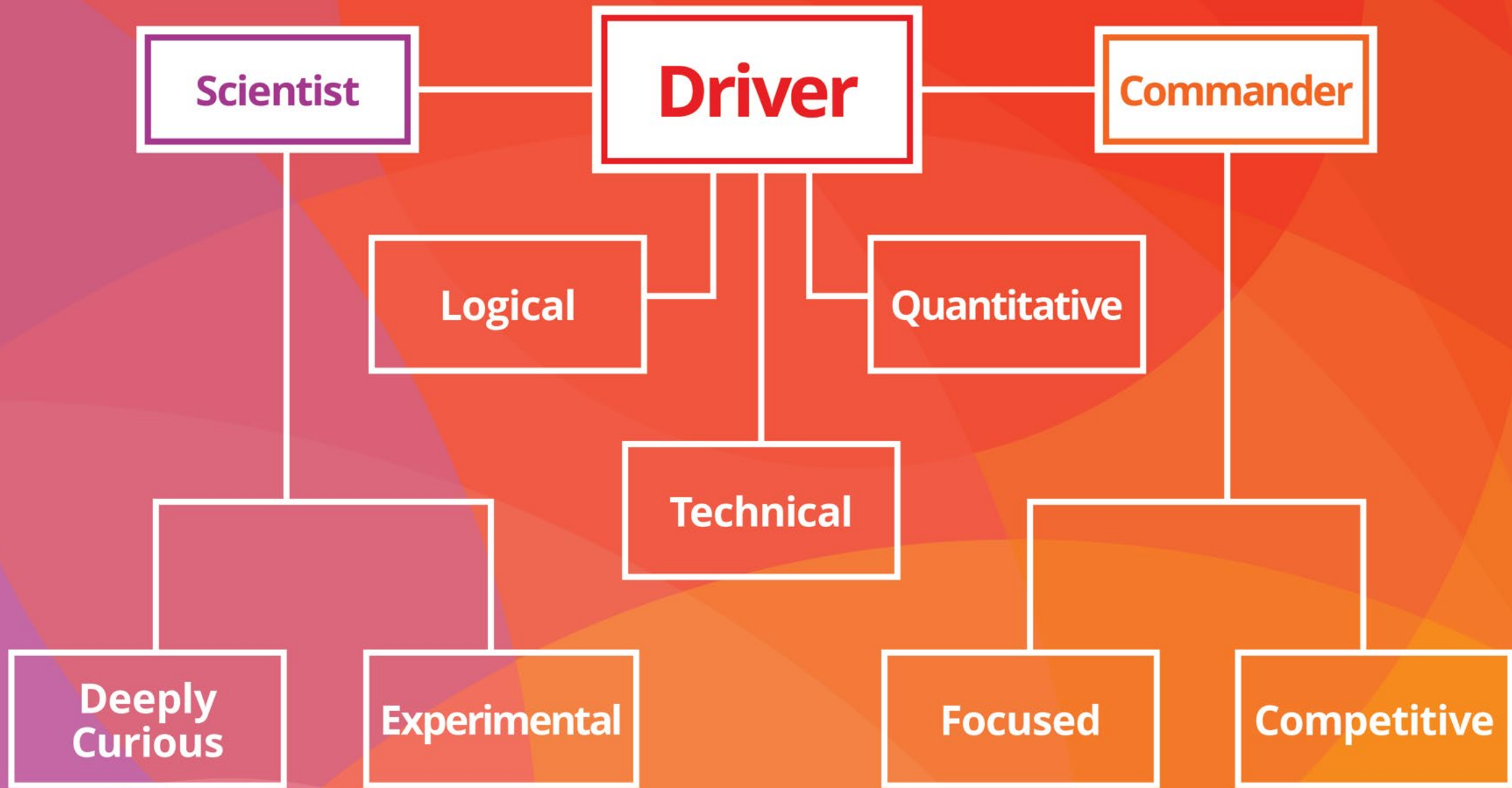
...**But** is all over the place. ”

“ Can move quickly...

...**But** lacks attention to detail and structure. ”

“ Creative...

...**But** impractical. ”



Perception: Likes & Gripes

•• Straight-shooter...

...**But** can be abrasive. ••

•• Focused...

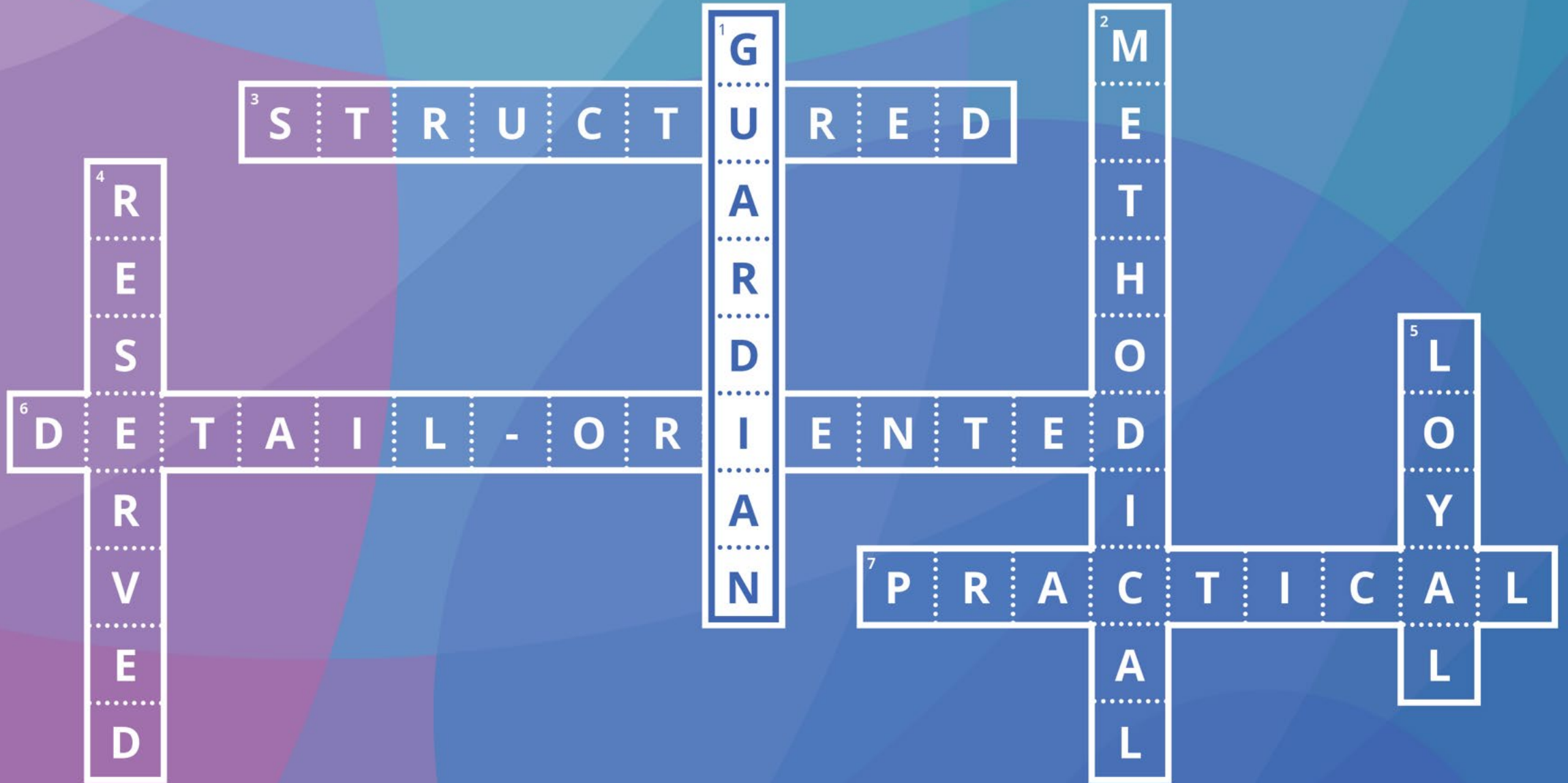
...**But** can also have tunnel vision. ••

•• Willing to take charge and lead the situation...

...**But** is controlling and self-serving. ••

•• Will get things done...

...**But** might value results over people. ••



Perception: Likes & Gripes

•• Trustworthy and thorough...

...**But** can be slow and stuck in the weeds. ••

•• Cool, calm, collected...

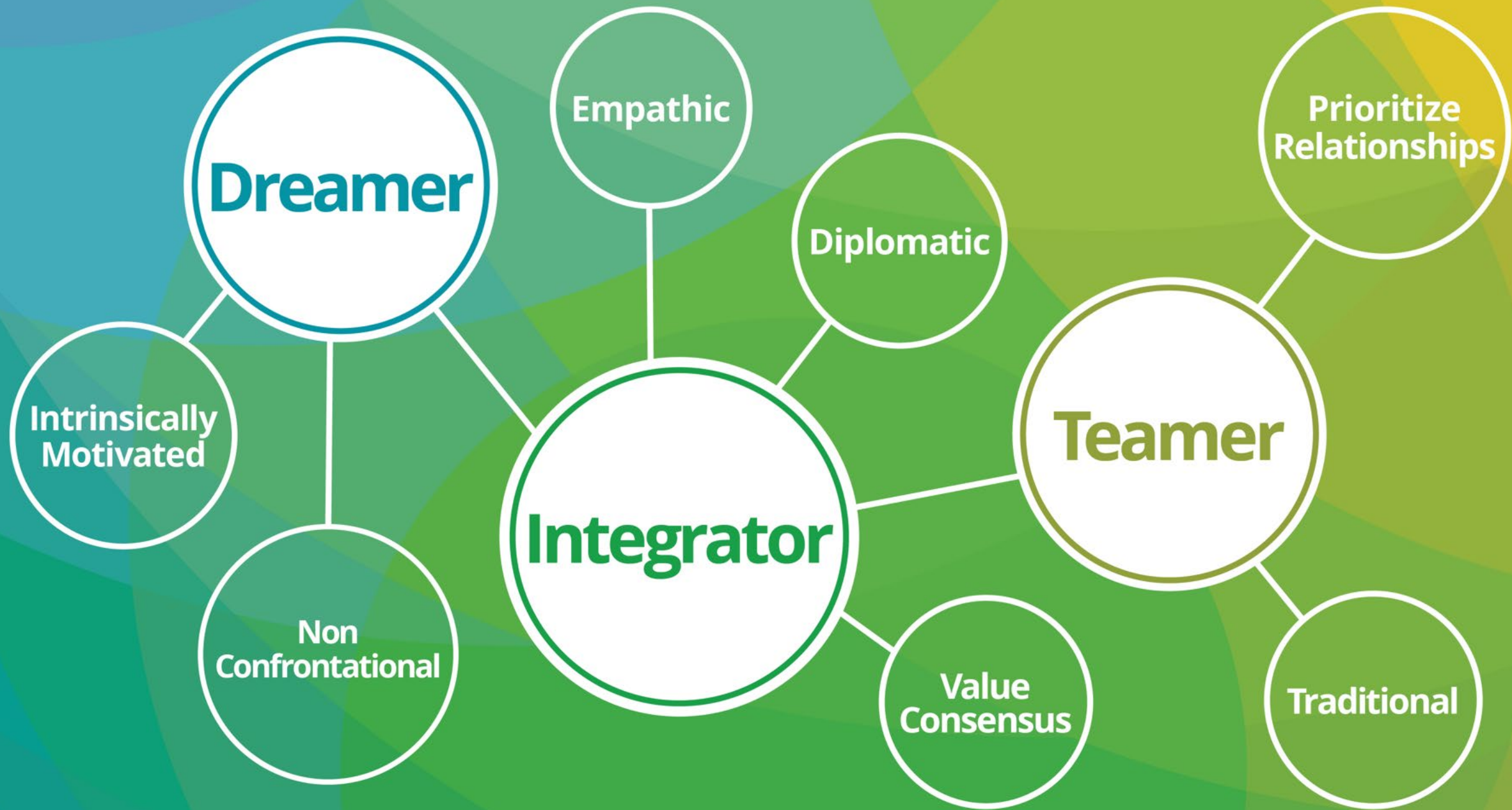
...**But** is also closed-off. ••

•• Committed to quality...

...**But** is a stickler for the rules. ••

•• Willing to take on the tedious work...

...**But** can be tedious to work with. ••



Perception: Likes & Gripes

•• Brings people together...

...**But** tries to please everyone. ••

•• Enjoyable to be around...

...**But** can be chatty and inefficient. ••

•• Emotionally attuned...

...**But** is also overly emotional. ••

•• Open-minded...

...**But** indecisive. ••



Understanding Business Chemistry Types of Others



When engaging a Pioneer...

Bring passion!
Silence your skeptic.
Keep things moving.
Whiteboard it!
Don't push details.
Deliver an experience.
Tolerate the chaos.

- **Get excited!** Sell your ideas with conviction.
- **Go for it!** Go big, buckle up, and enjoy the ride.
- **Watch out:** Don't get distracted from your purpose.

When engaging a Driver...



Lead with the punchline.
Build a logical argument.
Get your facts straight.
Assert your point of view.
Keep it tight!
Anticipate pushback.
Propose an experiment.

- **Bring a point of view.** Sell your ideas by sharing the facts upfront.
- **Go for it!** Be smart. Be quick. Be gone.
- **Watch out:** Don't be intimidated!



When engaging a Guardian...

Provide data in advance.
Respect the agenda.
Make it linear & concrete.
Cite your sources!
Give them time to process.
Keep emotions in check.
Honor precedent.

- **Be practical.** Sell your ideas with linear logic.
- **Go for it!** Be prepared.
- **Watch out:** Don't get too in the weeds with their penchant for details.



When engaging an Integrator...

Get personal.

Co-create.

Share context.

Ask questions & listen.

Don't rush!

Be open to alternatives.

Don't be a jerk.

- **Check emotions.** Sell your idea by asking how they feel.
- **Go for it!** Everything requires some give and take.
- **Watch out:** Don't leave without knowing where they stand.



Closing Remarks