

PRE-READ APPROACH FOR MANAGING CUSTOMER RECORDS LEADING PRACTICE WORKSHOP

DECEMBER 11, 2018



Objectives of the Leading Practice Workshop

1. Gather insights as they relate to the customer record
2. Present design principles and leading practices
3. Discuss these leading practices and gather participant perspective
4. Describe next steps



Brainstorming Activity: Rose, Bud, Thorn

In this activity, we will think about current customer record processes (i.e., in FLAIR and agency business systems) in terms of:

- **Roses** (*Green Post-it*): What is currently working well, and you would not want to change? (e.g. functionality, process, other items)
- **Buds** (*Blue Post-it*): What is currently working OK, but could use some improvement or additional work?
- **Thorns** (*Pink Post-it*): What are pain points that make it very difficult to do your job and/or reducing productivity and efficiency?

Activity Instructions

1. Individually write down your Roses, Buds and Thorns on the Post-it
2. Each participant shares their Rose, Buds and Thorns
3. Collect and combine the Post-its into corresponding categories (Rose, Bud and Thorn)
4. Discuss the results in the full group



Customer Record Leading Practices

1. Use a common customer identifier to enable data exchange across various types of customer records
2. Build a master customer data approach to enable intercept/offset of accounts payable as a mechanism to collect delinquent debt
3. Extend a master customer data approach to “intercept” at the point of service delivery as a mechanism to assist in the collection of delinquent debt
4. Allow customer self-service, without diminishing state controls, to enter and update data into the customer record
5. Address the privacy and security of customer records with strict confidentiality restrictions
6. Adopt an enterprise approach to governance for customer data



Breakout and Group Discussion

- ▶ We will divide up into 3 groups
- ▶ Each group will receive a poster board with two of the leading practices we reviewed in the prior section
- ▶ Based on the group's discussion, you will have 2 tasks:
 1. Identify which current pain points (e.g. "thorns"), or other value the State will realize by adopting this leading practice
 2. Identify obstacles that might keep the State from fully adopting this leading practice
- ▶ Be as specific as possible!
- ▶ After 15 minutes, groups will rotate (there will be 3 rotations)
- ▶ Then, we will reconvene and report back to the full group



CONTACT INFORMATION

CONTACT US

FLORIDAPALM@MYFLORIDACFO.COM

PROJECT WEBSITE

WWW.MYFLORIDACFO.COM/FLORIDAPALM/

